

Das Narayandas et al.

? logoff

```

14mar10 15:04:34 User264751 Session D729.5
$24.87 2.098 DialUnits File347
$24.87 Estimated cost File347
$7.48 1.277 DialUnits File348
$7.48 Estimated cost File348
$1.40 0.272 DialUnits File349
$1.70 1 Type(s) in Format 3
$0.27 1 Type(s) in Format 6
$1.97 2 Types
$3.37 Estimated cost File349
OneSearch, 3 files, 3.648 DialUnits FileOS
$3.47 INTERNET
$39.19 Estimated cost this search
$92.80 Estimated total session cost 12.757 DialUnits

```

Ended session: 2010/03/14 17:04:34

? logon

```

*** It is now 2010/03/14 17:04:42 ***
(Dialog time 2010/03/14 16:04:42)

```

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705TEXT1 is set ON as an alias for 15, 16, 160, 148, 621, 275, 634, 47
705TEXT2 is set ON as an alias for 9, 623, 810, 624, 813, 20, 636
705BILIT is set ON as an alias for 77, 35, 583, 2, 65, 233, 99
705NEWSBIB is set ON as an alias for 473, 474, 475
SOFTLIT is set ON as an alias for 256, 278
705ADLIT is set ON as an alias for 635, 570, PAPERSMJ, PAPERSEU
HIGHLIGHT set on as '' ''
DETAIL set off
KWIC is set to 50.

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? b

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610,613,634,810,813,20,583,474,475,35,65,99,256,9,15,16,148,160,275,621,636,624,2,4
76, 635, 570, PAPERSMJ, PAPERSEU, 47

```

```

>>> 476 does not exist
>>> 1 of the specified files is not available
14mar10 15:04:59 User264751 Session D730.1
$0.00 0.242 DialUnits File415
$0.00 Estimated cost File415
$0.08 INTERNET
$0.08 Estimated cost this search
$0.10 Estimated total session cost 0.242 DialUnits

```

```

SYSTEM:OS - DIALOG OneSearch
File 610:Business Wire 1999-2010/Mar 14
(c) 2010 Business Wire.

```

```

*File 610: contains data from 3/99 forward.
For archive data (1986-2/99) see File 810.

```

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File 613:PR Newswire 1999-2010/Mar 14
(c) 2010 PR Newswire Association Inc

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*File 613: File 613 now contains data from 5/99 forward.
Archive data (1987-4/99) is available in File 813.

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File 634:San Jose Mercury Jun 1985-2010/Mar 11
(c) 2010 San Jose Mercury News

File 810:Business Wire 1986-1999/Feb 28
(c) 1999 Business Wire

*File 810: contains data from 1986-1999.
See File 610 for current data.

File 813:PR Newswire 1987-1999/Apr 30
(c) 1999 PR Newswire Association Inc

*File 813: contains data from 1987-1999.
For current data see File 613.

File 20:Dialog Global Reporter 1997-2010/Mar 14
(c) 2010 Dialog

File 583:Gale Group Globalbase(TM) 1986-2002/Dec 13
(c) 2002 Gale/Cengage

*File 583: This file is no longer updating as of 12-13-2002.

File 474:New York Times Abs 1969-2010/Mar 13
(c) 2010 The New York Times

File 475:Wall Street Journal Abs 1973-2010/Mar 13
(c) 2010 The New York Times

File 35:Dissertation Abs Online 1861-2010/Feb
(c) 2010 ProQuest Info&Learning

File 65:Inside Conferences 1993-2010/Mar 12
(c) 2010 BLDSC all rts. reserv.

File 99:Wilson Appl. Sci & Tech Abs 1983-2010/Jan
(c) 2010 The HW Wilson Co.

File 256:TecTrends 1982-2010/Mar W1
(c) 2010 Info.Sources Inc. All rights res.

*File 256: Please see HELP NEWS 256 for the latest information about TecTrends.

File 9:Business & Industry(R) Jul/1994-2010/Mar 13
(c) 2010 Gale/Cengage

File 15:ABI/Inform(R) 1971-2010/Mar 13
(c) 2010 ProQuest Info&Learning

File 16:Gale Group PROMT(R) 1990-2010/Mar 12
(c) 2010 Gale/Cengage

File 148:Gale Group Trade & Industry DB 1976-2010/Mar 12
(c) 2010 Gale/Cengage

*File 148: CURRENT feature not working. See HELP NEWS148.

File 160:Gale Group PROMT(R) 1972-1989
(c) 1999 The Gale Group

File 275:Gale Group Computer DB(TM) 1983-2010/Feb 03
(c) 2010 Gale/Cengage

File 621:Gale Group New Prod.Annou.(R) 1985-2010/Jan 25
(c) 2010 Gale/Cengage

File 636:Gale Group Newsletter DB(TM) 1987-2010/Feb 09
(c) 2010 Gale/Cengage

File 624:McGraw-Hill Publications 1985-2010/Mar 12
(c) 2010 McGraw-Hill Co. Inc

File 2:INSPEC 1998-2010/Mar W1
(c) 2010 The IET

*File 2: IPC codes have been added to the file. See HELP NEWS 2 for details.

File 635:Business Dateline(R) 1985-2010/Mar 13
(c) 2010 ProQuest Info&Learning

File 570:Gale Group MARS(R) 1984-2010/Feb 03
(c) 2010 Gale/Cengage

File 387:The Denver Post 1994-2010/Mar 12

(c) 2010 Denver Post
File 471:New York Times Fulltext 1980-2010/Mar 14
(c) 2010 The New York Times
File 492:Arizona Repub/Phoenix Gaz 19862002/Jan 06
(c) 2002 Phoenix Newspapers
*File 492: no longer updates.
File 494:St LouisPost-Dispatch 1988-2010/Mar 12
(c) 2010 St Louis Post-Dispatch
File 631:Boston Globe 1980-2009/Dec 30
(c) 2010 Boston Globe
*File 631: No longer updates, last PD=20091231. Please
see NewsRoom for current Boston Globe records
File 633:Phil.Inquirer 1983-2010/Mar 14
(c) 2010 Philadelphia Newspapers Inc
File 638:Newsday/New York Newsday 1987-2010/Mar 14
(c) 2010 Newsday Inc.
File 640:San Francisco Chronicle 1988-2010/Mar 14
(c) 2010 Chronicle Publ. Co.
File 641:Rocky Mountain News Jun 1989-2009/Jan 16
(c) 2009 Scripps Howard News
*File 641: no longer updates.
The Rocky Mountain News is no longer published.
File 702:Miami Herald 1983-2010/Mar 14
(c) 2010 The Miami Herald Publishing Co.
File 703:USA Today 1989-2010/Mar 12
(c) 2010 USA Today
File 704:(Portland)The Oregonian 1989-2010/Mar 13
(c) 2010 The Oregonian
File 713:Atlanta J/Const. 1989-2010/Mar 13
(c) 2010 Atlanta Newspapers
File 714:(Baltimore) The Sun 1990-2010/Mar 13
(c) 2010 Baltimore Sun
File 715:Christian Sci.Mon. 1989-2009/Dec 07
(c) 2009 Christian Science Monitor
*File 715: No longer updates.
See instead NewsRoom.
File 725:(Cleveland)Plain Dealer Aug 1991-2010/Mar 13
(c) 2010 The Plain Dealer
File 735:St. Petersburg Times 1989- 2010/Mar 12
(c) 2010 St. Petersburg Times
File 477:Irish Times 1999-2010/Mar 13
(c) 2010 Irish Times
File 710:Times/Sun.Times(London) Jun 1988-2010/Mar 14
(c) 2010 Times Newspapers
File 711:Independent(London) Sep 1988-2006/Dec 12
(c) 2006 Newspaper Publ. PLC
*File 711: no longer updates. See NewsRoom for
daily coverage from many European sources.
File 756:Daily/Sunday Telegraph 2000-2010/Mar 14
(c) 2010 Telegraph Group
File 757:Mirror Publications/Independent Newspapers 2000-2010/Mar 14
(c) 2010
File 47:Gale Group Magazine DB(TM) 1959-2010/Feb 19
(c) 2010 Gale/Cengage

Set	Items	Description
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? s pd<20010119

```
Processed 30 of 48 files ...
Processing
Processed 40 of 48 files ...
Processing
Completed processing all files
S182704796 EP<20010119
```

```
>>> Retrying request [1]
```

? s sl and (catalog or catalogs or catalogue or catalogues) and (term or terms or condition or conditions or intrinsic or extrinsic) and ((purchase(w)(order or orders or requisition or requisitions or form or forms)) or shopping(w)(cart or basket))

Processing
Processed 10 of 48 files ...
Processing
Processing
Processed 20 of 48 files ...
Processing
Processed 30 of 48 files ...
Processing
Processed 40 of 48 files ...
Completed processing all files
82704796 S1
1037993 CATALOG
346307 CATALOGS
383449 CATALOGUE
101630 CATALOGUES
13853661 TERM
11459246 TERMS
4137917 CONDITION
10832834 CONDITIONS
264200 INTRINSIC
28099 EXTRINSIC
7697262 PURCHASE
18918434 ORDER
6929987 ORDERS
27274 REQUISITION
14456 REQUISITIONS

13304006	FORM
3213165	FORMS
181445	PURCHASE(W) (((((ORDER OR ORDERS) OR REQUISITION) OR REQUISITIONS) OR FORM) OR FORMS)
4267271	SHOPPING
300046	CART
594526	BASKET
67683	SHOPPING(W) (CART OR BASKET)
S2 4508	S1 AND (CATALOG OR CATALOGS OR CATALOGUE OR CATALOGUES)
ORDERS	AND (TERM OR TERMS OR CONDITION OR CONDITIONS OR INTRINSIC OR EXTRINSIC) AND ((PURCHASE(W) (ORDER OR ORDERS
	OR REQUISITION OR REQUISITIONS OR FORM OR FORMS)) OR SHOPPING(W) (CART OR BASKET))

? s1 and (catalog or catalogs or catalogue or catalogues) and ((term or terms or intrinsic or extrinsic or condition or conditions or intrinsic or extrinsic)(8n)((purchase(w)(order or orders or requisition or requisitions or form or forms)) or shopping(w)(cart or basket)))

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 Processed 20 of 48 files ...
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 Processed 30 of 48 files ...
 Completed processing all files
 82704796 S1
 1037993 CATALOG
 346307 CATALOGS
 383449 CATALOGUE
 101630 CATALOGUES
 13853661 TERM
 11459246 TERMS
 264200 INTRINSIC
 28099 EXTRINSIC
 4137917 CONDITION
 10832834 CONDITIONS
 264200 INTRINSIC

28099	EXTRINSIC	
7697262	PURCHASE	
18918434	ORDER	
6929987	ORDERS	
27274	REQUISITION	
14456	REQUISITIONS	
13304006	FORM	
3213165	FORMS	
181445	PURCHASE(W) (((((ORDER OR ORDERS) OR REQUISITION) OR REQUISITIONS) OR FORM) OR FORMS)	
4267271	SHOPPING	
300046	CART	
594526	BASKET	
67683	SHOPPING(W) (CART OR BASKET)	
6145	((((((TERM OR TERMS) OR INTRINSIC) OR EXTRINSIC) OR CONDITION) OR CONDITIONS) OR INTRINSIC) OR EXTRINSIC) (8N) (PURCHASE(W) (((((ORDER OR ORDERS) OR REQUISITION) OR REQUISITIONS) OR FORM) OR FORMS) OR SHOPPING(W) (CART OR BASKET))	
S3	149	S1 AND (CATALOG OR CATALOGS OR CATALOGUE OR CATALOGUES)
		AND ((TERM OR TERMS OR INTRINSIC OR EXTRINSIC OR CONDITION OR CONDITIONS OR INTRINSIC OR EXTRINSIC) (8N) ((PURCHASE(W) (ORDER OR ORDERS OR REQUISITION OR REQUISITIONS OR FORM OR FORMS)) OR SHOPPING(W) (CART OR BASKET)))

>>> Retrying request [1]

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 82704796 S1
 1037993 CATALOG
 346307 CATALOGS
 383449 CATALOGUE
 101630 CATALOGUES
 546596 EXTRACT
 209477 EXTRACTS
 363819 EXTRACTED
 160418 EXTRACTING
 1715677 EXTRACTION
 13853661 TERM
 11459246 TERMS

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264200 INTRINSIC
28099 EXTRINSIC
4137917 CONDITION
10832834 CONDITIONS
264200 INTRINSIC
28099 EXTRINSIC
11969 (((EXTRACT OR EXTRACTS) OR EXTRACTED) OR EXTRACTING)
OR
EXTRACTION) (3N) (((((TERM OR TERMS) OR INTRINSIC) OR
EXTRINSIC) OR CONDITION) OR CONDITIONS) OR INTRINSIC)
OR
EXTRINSIC)
S4      49  S1 AND (CATALOG OR CATALOGS OR CATALOGUE OR
CATALOGUES)
AND ((EXTRACT OR EXTRACTS OR EXTRACTED OR EXTRACTING
OR
EXTRACTION) (3N) (TERM OR TERMS OR INTRINSIC OR
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EXTRINSIC)
OR CONDITION OR CONDITIONS OR INTRINSIC OR
EXTRINSIC))

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? s \$1 and (catalog or catalogs or catalogue or catalogues) and ((incorporate or incorporates or incorporated or incorporating or incorporation)(3n)(term or terms or intrinsic or extrinsic or condition or conditions or intrinsic or extrinsic))

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Processed 10 of 48 files ...
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Processed 20 of 48 files ...
Processing
Completed processing all files
82704796 S1
1037993 CATALOG
346307 CATALOGS
383449 CATALOGUE
101630 CATALOGUES
1170103 INCORPORATE
839170 INCORPORATES
2219636 INCORPORATED
810597 INCORPORATING
349355 INCORPORATION
13853661 TERM
11459246 TERMS
264200 INTRINSIC
28099 EXTRINSIC
4137917 CONDITION
10832834 CONDITIONS
264200 INTRINSIC
28099 EXTRINSIC

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23348 (((((INCORPORATE OR INCORPORATES) OR INCORPORATED) OR
INCORPORATING) OR INCORPORATION) (3N) (((((TERM OR
TERMS)
OR INTRINSIC) OR EXTRINSIC) OR CONDITION) OR
CONDITIONS)
OR INTRINSIC) OR EXTRINSIC)
S5 165 S1 AND (CATALOG OR CATALOGS OR CATALOGUE OR
CATALOGUES)
AND ((INCORPORATE OR INCORPORATES OR INCORPORATED OR
INCORPORATING OR INCORPORATION) (3N) (TERM OR TERMS OR
INTRINSIC OR EXTRINSIC OR CONDITION OR CONDITIONS OR
INTRINSIC OR EXTRINSIC))

? s1 and (catalog or catalogs or catalogue or catalogues) and ((import or imports
or imported or importing or importation)(3n)(term or terms or intrinsic or extrinsic
or condition or conditions or intrinsic or extrinsic))

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Processing 10 of 48 files ...
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Completed processing all files
82704796 S1
1037993 CATALOG
346307 CATALOGS
383449 CATALOGUE
101630 CATALOGUES
1647240 IMPORT
2050221 IMPORTS
1079932 IMPORTED
324403 IMPORTING
112737 IMPORTATION
13853661 TERM
11459246 TERMS
264200 INTRINSIC
28099 EXTRINSIC
4137917 CONDITION
10832834 CONDITIONS
264200 INTRINSIC
28099 EXTRINSIC
31097 (((IMPORT OR IMPORTS) OR IMPORTED) OR IMPORTING) OR
IMPORTATION) (3N) (((((TERM OR TERMS) OR INTRINSIC)
OR
EXTRINSIC) OR CONDITION) OR CONDITIONS) OR INTRINSIC)
OR
EXTRINSIC)
S6 210 S1 AND (CATALOG OR CATALOGS OR CATALOGUE OR
CATALOGUES)

AND ((IMPORT OR IMPORTS OR IMPORTED OR IMPORTING OR
IMPORTATION) (3N) (TERM OR TERMS OR INTRINSIC OR
INTRINSIC)
EXTRINSIC
EXTRINSIC))
OR CONDITION OR CONDITIONS OR INTRINSIC OR

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>>> Retrying request [1]
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? s1 and (catalog or catalogs or catalogue or catalogues) and ((include or includes or included or including)(3n)(term or terms or intrinsic or extrinsic or condition or conditions or intrinsic or extrinsic))

Processing
Processed 10 of 48 files ...
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Processed 30 of 48 files ...
Processing
Processed 40 of 48 files ...
Completed processing all files
82704796 S1
1037993 CATALOG
346307 CATALOGS
383449 CATALOGUE
101630 CATALOGUES
23527726 INCLUDE
14203805 INCLUDES
11230655 INCLUDED
37131442 INCLUDING
13853661 TERM
11459246 TERMS
264200 INTRINSIC
28099 EXTRINSIC

4137917 CONDITION
 10832834 CONDITIONS
 264200 INTRINSIC
 28099 EXTRINSIC
 1052533 (((INCLUDE OR INCLUDES) OR INCLUDED) OR
 INCLUDING)(3N)((((TERM OR TERMS) OR INTRINSIC) OR
 EXTRINSIC) OR CONDITION) OR CONDITIONS) OR INTRINSIC)
 OR
 EXTRINSIC)
 S7 4948 S1 AND (CATALOG OR CATALOGS OR CATALOGUE OR
 CATALOGUES)
 AND ((INCLUDE OR INCLUDES OR INCLUDED OR
 INCLUDING)(3N)(TERM OR TERMS OR INTRINSIC OR
 EXTRINSIC OR
 CONDITION OR CONDITIONS OR INTRINSIC OR EXTRINSIC))

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Set Items Description
 S1 82704796 PD<20010119
 S2 4508 S1 AND (CATALOG OR CATALOGS OR CATALOGUE OR CATALOGUES)
 AND
 (TERM OR TERMS OR CONDITION OR CONDITIONS OR INTRINSIC OR
 EX-
 TRINSIC) AND ((PURCHASE(W) (ORDER OR ORDERS OR REQUISITION
 OR -
 REQUISITIONS OR FORM OR FORMS)) OR SHOPPING(W) (CART OR
 BASKET-
))
 S3 149 S1 AND (CATALOG OR CATALOGS OR CATALOGUE OR CATALOGUES)
 AND
 ((TERM OR TERMS OR INTRINSIC OR EXTRINSIC OR CONDITION OR
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 NDITIONS OR INTRINSIC OR EXTRINSIC)(8N)((PURCHASE(W) (ORDER
 OR
 ORDERS OR REQUISITION OR REQUISITIONS OR FORM OR FORMS))
 OR S-
 HOPPING(W) (CART OR BASKET)))
 S4 49 S1 AND (CATALOG OR CATALOGS OR CATALOGUE OR CATALOGUES)
 AND
 ((EXTRACT OR EXTRACTS OR EXTRACTED OR EXTRACTING OR
 EXTRACTI-
 ON)(3N)(TERM OR TERMS OR INTRINSIC OR EXTRINSIC OR
 CONDITION -
 OR CONDITIONS OR INTRINSIC OR EXTRINSIC))
 S5 165 S1 AND (CATALOG OR CATALOGS OR CATALOGUE OR CATALOGUES)
 AND
 ((INCORPORATE OR INCORPORATES OR INCORPORATED OR
 INCORPORATI-
 NG OR INCORPORATION)(3N)(TERM OR TERMS OR INTRINSIC OR
 EXTRIN-
 SIC OR CONDITION OR CONDITIONS OR INTRINSIC OR EXTRINSIC))
 S6 210 S1 AND (CATALOG OR CATALOGS OR CATALOGUE OR CATALOGUES)
 AND
 ((IMPORT OR IMPORTS OR IMPORTED OR IMPORTING OR
 IMPORTATION)-)

OR - (3N) (TERM OR TERMS OR INTRINSIC OR EXTRINSIC OR CONDITION
CONDITIONS OR INTRINSIC OR EXTRINSIC))
S7 4948 S1 AND (CATALOG OR CATALOGS OR CATALOGUE OR CATALOGUES)
AND ((INCLUDE OR INCLUDES OR INCLUDED OR INCLUDING) (3N) (TERM
OR - TERMS OR INTRINSIC OR EXTRINSIC OR CONDITION OR CONDITIONS
OR INTRINSIC OR EXTRINSIC))

? s (s4 or s5 or s6 or s7) and ((PURCHASE(W)(ORDER OR ORDERS OR
REQUISITION OR REQUISITIONS OR FORM OR FORMS)) OR
SHOPPING(W)(CART OR BASKET))

Processing

Processing

Processing

Processing

Processing

Processing

Processed 10 of 48 files ...

Processing

Processed 20 of 48 files ...

Processing

Completed processing all files

49 S4

165 S5

210 S6

4948 S7

7697262 PURCHASE

18918434 ORDER

6929987 ORDERS

27274 REQUISITION

14456 REQUISITIONS

13304006 FORM

3213165 FORMS

181445 PURCHASE(W) (((((ORDER OR ORDERS) OR REQUISITION) OR
REQUISITIONS) OR FORM) OR FORMS)

4267271 SHOPPING

300046 CART

594526 BASKET

67683 SHOPPING(W) (CART OR BASKET)

S8 193 (S4 OR S5 OR S6 OR S7) AND ((PURCHASE(W) (ORDER OR
ORDERS

OR REQUISITION OR REQUISITIONS OR FORM OR FORMS)) OR
SHOPPING(W) (CART OR BASKET))

? s s8 and (tax or taxes or duties or tariffs or laws or statute or statutes or regulation
or regulations or law)

Processing
Processing
Processing
Processing
Processed 20 of 48 files ...
Completed processing all files
 193 S8
 9608597 TAX
 4323551 TAXES
 1466039 DUTIES
 511994 TARIFFS
 4937523 LAWS
 339399 STATUTE
 100663 STATUES
 7966260 REGULATION
 4094459 REGULATIONS
 13216730 LAW
S9 86 S8 AND (TAX OR TAXES OR DUTIES OR TARIFFS OR LAWS OR
 STATUTE OR STATUES OR REGULATION OR REGULATIONS OR
 LAW)

? rd

S10 64 RD (unique items)

? s8 and (tax or taxes or duty or duties or tariff or tariffs or law or laws or statute
or statutes or regulatory orregulation or regulations)

Processing
Processing
Processed 30 of 48 files ...
Processing
Completed processing all files
 193 S8
 9608597 TAX
 4323551 TAXES
 2946168 DUTY
 1466039 DUTIES
 544565 TARIFF
 511994 TARIFFS
 13216730 LAW
 4937523 LAWS
 339399 STATUTE
 100663 STATUES
 0 REGULATORY ORREGULATION
 4094459 REGULATIONS
S11 90 S8 AND (TAX OR TAXES OR DUTY OR DUTIES OR TARIFF OR
 TARIFFS OR LAW OR LAWS OR STATUTE OR STATUES OR
 REGULATORY ORREGULATION OR REGULATIONS)

? rd

S12 68 RD (unique items)

? t s12/3/all

12/3/1 (Item 1 from file: 610)
DIALOG(R)File 610: Business Wire
(c) 2010 Business Wire. All rights reserved.

00442039 20010116016B0498 (USE FORMAT 7 FOR FULLTEXT)
LP Selects Metiom to Build Corporate E-Procurement Platform; Building Products
Supplier to Move Corporate Purchasing to the Web for Increased Efficiency and
Cost Benefits

Business Wire
Tuesday , January 16, 2001 08:33 EST
Journal Code: BW Language: ENGLISH Record Type: FULLTEXT Document
Type: NEWswire
Word Count: 759

12/3/2 (Item 2 from file: 610)
DIALOG(R)File 610: Business Wire
(c) 2010 Business Wire. All rights reserved.

00413692 20001120325B1577 (USE FORMAT 7 FOR FULLTEXT)
Delta Financial Corporation Launches Senior Notes Exchange Offer

Business Wire
Monday , November 20, 2000 16:18 EST
Journal Code: BUSINESS WIRE, COMTEX Language: ENGLISH Record Type:
FULLTEXT Document Type: NEWswire
Word Count: 9,389

12/3/3 (Item 3 from file: 610)
DIALOG(R)File 610: Business Wire
(c) 2010 Business Wire. All rights reserved.

00385297 20001016290B2085 (USE FORMAT 7 FOR FULLTEXT)
webMethods Delivers B2B Adapter for Use with J.D. Edwards' WorldSoftware; CE
Franklin Ltd. First Customer to Deploy Solution-New Adapter Offers CE Franklin
Seamless Business-to-Business Integration Between Their WorldSoftware...

Business Wire
Monday , October 16, 2000 08:05 EDT
Journal Code: BW Language: ENGLISH Record Type: FULLTEXT Document
Type: NEWswire
Word Count: 1,301

12/3/4 (Item 4 from file: 610)
DIALOG(R)File 610: Business Wire
(c) 2010 Business Wire. All rights reserved.

00374123 20000929273B0521 (USE FORMAT 7 FOR FULLTEXT)
e-MedSoft.com's U.K. Division to Preview Its e-Procurement Software at Exchange in Healthcare Information Conference

Business Wire
Friday , September 29, 2000 03:19 EDT
Journal Code: BW Language: ENGLISH Record Type: FULLTEXT Document
Type: NEWswire
Word Count: 870

12/3/5 (Item 5 from file: 610)
DIALOG(R)File 610: Business Wire
(c) 2010 Business Wire. All rights reserved.

00354282 20000830243B9795 (USE FORMAT 7 FOR FULLTEXT)
WatchGuard Begins Japanese Language LiveSecurity Service; Broadcasts Focus On the Security Management Needs of WatchGuard Subscribers in Japan

Business Wire
Wednesday , August 30, 2000 20:04 EDT
Journal Code: BW Language: ENGLISH Record Type: FULLTEXT Document
Type: NEWswire
Word Count: 6,997

12/3/6 (Item 6 from file: 610)
DIALOG(R)File 610: Business Wire
(c) 2010 Business Wire. All rights reserved.

00345488 20000816229B0678 (USE FORMAT 7 FOR FULLTEXT)
HearMe Executive VP Interviews On RadioWallStreet.com

Business Wire
Wednesday , August 16, 2000 17:30 EDT
Journal Code: BW Language: ENGLISH Record Type: FULLTEXT Document
Type: NEWswire
Word Count: 22,411

12/3/7 (Item 7 from file: 610)
DIALOG(R)File 610: Business Wire
(c) 2010 Business Wire. All rights reserved.

00273679 20000508129B4216 (USE FORMAT 7 FOR FULLTEXT)
e-MedSoft.com Implements Revolutionary e-Procurement System in Wales; Welsh Health Supplies Represents 135 Hospitals throughout Region

Business Wire
Monday , May 8, 2000 03:45 EDT
Journal Code: BW Language: ENGLISH Record Type: FULLTEXT Document
Type: NEWSWIRE
Word Count: 916

12/3/8 (Item 8 from file: 610)
DIALOG(R)File 610: Business Wire
(c) 2010 Business Wire. All rights reserved.

00115235 19991006279B1262 (USE FORMAT 7 FOR FULLTEXT)
iMALL Introduces iSTORE Wizard, Next- Generation Web Store Building Tool; Suite of E-Commerce Services Continues to Expand

Business Wire
Wednesday , October 6, 1999 09:23 EDT
Journal Code: BW Language: ENGLISH Record Type: FULLTEXT Document
Type: NEWSWIRE
Word Count: 650

12/3/9 (Item 1 from file: 20)
DIALOG(R)File 20: Dialog Global Reporter
(c) 2010 Dialog. All rights reserved.

76430178 (USE FORMAT 7 OR 9 FOR FULLTEXT)
www.standoutstocks.com: Stocks That Stand Out For Jan. 22nd, 2010 Are Jan 22, 2010 SymPowerco Corporation (PINKSHEETS: SYMW), Jan 22, 2010 Gen2Media Corporation (OTC Bulletin Board: GTWO), Jan 22, 2010 China Crescent Enterprises, Inc. (OTC Bulletin Board:

M2 PRESSWIRE
January 22, 2010
Journal Code: WMPR Language: English Record Type: FULLTEXT
Word Count: 3221

12/3/10 (Item 2 from file: 20)
DIALOG(R)File 20: Dialog Global Reporter
(c) 2010 Dialog. All rights reserved.

13310883 (USE FORMAT 7 OR 9 FOR FULLTEXT)
webMethods Delivers B2B Adapter for Use with J.D. Edwards' WorldSoftware; CE
Franklin Ltd. First Customer to Deploy Solution

BUSINESS WIRE

October 16, 2000

Journal Code: WBWE Language: English Record Type: FULLTEXT
Word Count: 1283

12/3/11 (Item 3 from file: 20)
DIALOG(R)File 20: Dialog Global Reporter
(c) 2010 Dialog. All rights reserved.

12316501 (USE FORMAT 7 OR 9 FOR FULLTEXT)
Infobank Int. Hldgs - Interim Results

REGULATORY NEWS SERVICE
August 09, 2000

Journal Code: WRNS Language: English Record Type: FULLTEXT
Word Count: 3208

12/3/12 (Item 4 from file: 20)
DIALOG(R)File 20: Dialog Global Reporter
(c) 2010 Dialog. All rights reserved.

06813986 (USE FORMAT 7 OR 9 FOR FULLTEXT)
INDIA: NEWSPRINT MARKET (2)

INDUSTRY SECTOR ANALYSIS
June 19, 1999

Journal Code: FISA Language: English Record Type: FULLTEXT
Word Count: 3234

12/3/13 (Item 1 from file: 9)
DIALOG(R)File 9: Business & Industry(R)
(c) 2010 Gale/Cengage. All rights reserved.

01555777 Supplier Number: 24262113 (USE FORMAT 7 OR 9 FOR FULLTEXT)
Sterling Forges Ahead With EDI
(Sterling Commerce Inc introduces Gentran WebSuite 4.0, which uses HTTP to
move EDI data)

InternetWeek , p 19+
May 18, 1998

Document Type: Journal **ISSN:** 0746-8121 (United States)
Language: English **Record Type:** Fulltext
Word Count: 798

12/3/14 (Item 2 from file: 9)
DIALOG(R)File 9: Business & Industry(R)
(c) 2010 Gale/Cengage. All rights reserved.

01023834 Supplier Number: 23602244 (USE FORMAT 7 OR 9 FOR FULLTEXT)
Making the back-of-the-house state of the art
(Applebee's Neighborhood Grill & Bar works to provide an appetizing menu at a low price and at a fraction of the time typical at several sit-down restaurants)

Nation's Restaurant News , v 30 , n 30 , p 68+
August 05, 1996

Document Type: Journal; Company Overview **ISSN:** 0028-0518 (United States)
Language: English **Record Type:** Fulltext
Word Count: 2164

Dialog eLink: [USPTO Full Text Retrieval Options](#)
12/3/15 (Item 1 from file: 15)
DIALOG(R)File 15: ABI/Inform(R)
(c) 2010 ProQuest Info&Learning. All rights reserved.

02556276 254348901
Fraud auditing

Vanasco, Rocco R
Managerial Auditing Journal v13n1 pp: 4-71
1998
ISSN: 0268-6902 **Journal Code:** MAJ
Word Count: 49489

Dialog eLink: [USPTO Full Text Retrieval Options](#)
12/3/16 (Item 2 from file: 15)
DIALOG(R)File 15: ABI/Inform(R)
(c) 2010 ProQuest Info&Learning. All rights reserved.

02367381 117541709
Identifying effectiveness criteria for Internet payment systems

Shon, Tae-Hwan; Swatman, Paula M C
Internet Research v8n3 pp: 202-218

1998

ISSN: 1066-2243 **Journal Code:** NTRS

Word Count: 9810

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/3/17 (Item 3 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

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01986407 43693453

1998-1999 Annual report: The Ohio Society of CPAs

Anonymous

Ohio CPA Journal v58n3 pp: 9-25

Jul-Sep 1999

ISSN: 0749-8284 **Journal Code:** OCP

Word Count: 4067

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/3/18 (Item 4 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

(c) 2010 ProQuest Info&Learning. All rights reserved.

01813978 04-64969

A few comments about the proposed revisions to UCC section 2-207: The battle of the forms taken to the limit of reason

White, Phillip A

Commercial Law Journal v103n4 pp: 471-488

Winter 1998

ISSN: 0010-3055 **Journal Code:** CLJ

Word Count: 7499

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/3/19 (Item 5 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

(c) 2010 ProQuest Info&Learning. All rights reserved.

01795366 04-446357

Organizing and managing channels of distribution

Frazier, Gary L

Journal of the Academy of Marketing Science v27n2 pp: 226-240

Spring 1999

ISSN: 0092-0703 Journal Code: AMK

Word Count: 11983

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/3/20 (Item 6 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

(c) 2010 ProQuest Info&Learning. All rights reserved.

01736119 03-87109

Bank on it: Brother, do you owe me a dime? Part II

Racond, Bruce

Office Systems v15n11 pp: 45-49

Nov 1998

ISSN: 8750-3441 Journal Code: OFS

Word Count: 2149

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/3/21 (Item 7 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

(c) 2010 ProQuest Info&Learning. All rights reserved.

01721258 03-72248

Evaluated receipts settlement (ERS) and tax compliance

Anonymous

Tax Executive v50n5 pp: 350-357

Sep/Oct 1998

ISSN: 0040-0025 Journal Code: TXE

Word Count: 4332

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/3/22 (Item 8 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

(c) 2010 ProQuest Info&Learning. All rights reserved.

01558646 02-09635

ArtSource: Selling art through catalogs

Smith, Maggie

Direct Marketing v60n9 pp: 14-19

Jan 1998

ISSN: 0012-3188 Journal Code: DIM

Word Count: 2997

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/3/23 (Item 9 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

(c) 2010 ProQuest Info&Learning. All rights reserved.

01359112 00-10099

The art of asset management

Parker, Kevin

Manufacturing Systems v14n7 pp: 108-113

Jul 1996

ISSN: 0748-948X Journal Code: MFS

Word Count: 2401

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/3/24 (Item 10 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

(c) 2010 ProQuest Info&Learning. All rights reserved.

01156965 98-06360

In defense of the sales statute of frauds and parole evidence rule: A fair price of admission to the courts

Shanker, Morris G

Commercial Law Journal v100n3 pp: 259-280

Fall 1995

ISSN: 0010-3055 Journal Code: CLJ

Word Count: 10097

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/3/25 (Item 11 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

(c) 2010 ProQuest Info&Learning. All rights reserved.

00983546 96-32939

Legal aspects of salesperson commission payments: Implications for the implementation of commission sales programs

Fine, Leslie M; Franke, Janice R
Journal of Personal Selling & Sales Management v15n1 pp: 53-68
Winter 1995
ISSN: 0885-3134 Journal Code: JPN
Word Count: 7532

Dialog eLink: [USPTO Full Text Retrieval Options](#)
12/3/26 (Item 12 from file: 15)
DIALOG(R)File 15: ABI/Inform(R)
(c) 2010 ProQuest Info&Learning. All rights reserved.

00728021 93-77242
PC System Sets New Standard

Schell, Ernest H.
Catalog Age v9n8 pp: 75-77
Aug 1992
ISSN: 0740-3119 Journal Code: CTA
Word Count: 1343

Dialog eLink: [USPTO Full Text Retrieval Options](#)
12/3/27 (Item 13 from file: 15)
DIALOG(R)File 15: ABI/Inform(R)
(c) 2010 ProQuest Info&Learning. All rights reserved.

00725856 93-75077
Network Dyads in Entrepreneurial Settings: A Study of the Governance of Exchange Relationships

Larson, Andrea
Administrative Science Quarterly v37n1 pp: 76-104
Mar 1992
ISSN: 0001-8392 Journal Code: ASQ
Word Count: 12371

Dialog eLink: [USPTO Full Text Retrieval Options](#)
12/3/28 (Item 14 from file: 15)
DIALOG(R)File 15: ABI/Inform(R)
(c) 2010 ProQuest Info&Learning. All rights reserved.

00639830 92-54770

Small-Business Accounting

Heid, Jim
Macworld v9n11 pp: 219-224
Nov 1992

ISSN: 0741-8647 **Journal Code:** MAW
Word Count: 2854

12/3/29 (Item 1 from file: 16)
DIALOG(R)File 16: Gale Group PROMT(R)
(c) 2010 Gale/Cengage. All rights reserved.

05609309 **Supplier Number:** 48487569 **(USE FORMAT 7 FOR FULLTEXT)**

Sterling ForgesAhead With EDI

Frook, John Evan

InternetWeek , p 19

May 18 , 1998

Language: English **Record Type:** Fulltext

Document Type: Newsletter ; Trade

Word Count: 824

12/3/30 (Item 1 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
(c) 2010 Gale/Cengage. All rights reserved.

0026326385 **Supplier Number:** 217191642 **(USE FORMAT 7 OR 9 FOR FULL TEXT)**

Stocks That Stand Out For Jan. 22nd, 2010 Are Jan 22, 2010 - SymPowerco Corporation (PINKSHEETS: SYMW), Jan 22, 2010 - Gen2Media Corporation (OTC Bulletin Board: GTWO), Jan 22, 2010 - China Crescent Enterprises, Inc. (OTC Bulletin Board: CCTR), Jan 21, 2010 - Zevotek, Inc., (OTC Bulletin Board: ZVTK), Jan 21, 2010 - Effective today, Americas Energy Company (OTC Bulletin Board: AENY).

M2 Presswire , NA
Jan 22 , 2010

Language: English

Record Type: Fulltext

Word Count: 3536 **Line Count:** 00304

12/3/31 (Item 2 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
(c) 2010 Gale/Cengage. All rights reserved.

0026263155 **Supplier Number:** 215949294 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Don't Miss Out On The Hottest Newsletter!! Hear It Here First!!
CDIV,ECOB,AEMD,BGNN,APDN,ACTC.

M2 Presswire , NA

Jan 7 , 2010

Language: English

Record Type: Fulltext

Word Count: 3774 **Line Count:** 00337

12/3/32 (Item 3 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

(c) 2010 Gale/Cengage. All rights reserved.

12195856 **Supplier Number:** 62498235 (USE FORMAT 7 OR 9 FOR FULL TEXT)
PRIVACY 2000 IN WEB WE TRUST?(News Briefs)

TYNAN, DANIEL

PC World , 18 , 6 , 103

June , 2000

ISSN: 0737-8939

Language: English

Record Type: Fulltext

Word Count: 6709 **Line Count:** 00523

12/3/33 (Item 4 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

(c) 2010 Gale/Cengage. All rights reserved.

11271507 **Supplier Number:** 55471542 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Information management.(1999 Buyers Guide)(Buyers Guide)

Nursing Homes , 48 , 7 , 111(2)

July , 1999

Document Type: Buyers Guide

ISSN: 1061-4753

Language: English

Record Type: Fulltext

Word Count: 15886 **Line Count:** 01419

12/3/34 (Item 5 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

(c) 2010 Gale/Cengage. All rights reserved.

10225529 **Supplier Number:** 20620326 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Sterling ForgesAhead With EDI.(Sterling Commerce Inc's Gentran WebSuite 4.0)(Product Announcement)

Frook, John Evan
InternetWeek , n715 , p19(1)
May 18 , 1998
Document Type: Product Announcement
ISSN: 1096-9969
Language: English
Record Type: Fulltext; Abstract
Word Count: 890 **Line Count:** 00076

12/3/35 (Item 6 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
(c) 2010 Gale/Cengage. All rights reserved.

09828608 **Supplier Number:** 17415577 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Total Library Computerization, Version 2: a DOS-based program from On Point Inc., for managing small to midsized libraries. (Software Review)(Evaluation)

Combs, Joseph, Jr.
Library Software Review , v14 , n3 , p185(15)
Fall , 1995
Document Type: Evaluation
ISSN: 0742-5759
Language: English
Record Type: Fulltext; Abstract
Word Count: 10940 **Line Count:** 00920

12/3/36 (Item 7 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
(c) 2010 Gale/Cengage. All rights reserved.

08899044 **Supplier Number:** 18562140
Making the back-of-the-house state of the art.(Company Profile: Applebee's International Inc.)

Liddle, Alan
Nation's Restaurant News , v30 , n30 , p68(4)
August 5 , 1996
ISSN: 0028-0518
Language: English

Record Type: Fulltext; Abstract
Word Count: 4468 **Line Count:** 00355

12/3/37 (Item 8 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
(c) 2010 Gale/Cengage. All rights reserved.

08661169 **Supplier Number:** 18126169 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Computer software offers something for everyone.

Air Conditioning, Heating & Refrigeration News , v197 , n12 , p3(2)
March 18 , 1996
ISSN: 0002-2276
Language: English
Record Type: Fulltext; Abstract
Word Count: 1416 **Line Count:** 00134

12/3/38 (Item 9 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
(c) 2010 Gale/Cengage. All rights reserved.

07583362 **Supplier Number:** 16469398 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Lending to the apparel industry.

Martin, J. Timothy; Slaybaugh, Charles
Journal of Commercial Lending , v77 , n3 , p26(11)
Nov , 1994
ISSN: 1062-6271
Language: ENGLISH
Record Type: FULLTEXT; ABSTRACT
Word Count: 3804 **Line Count:** 00308

12/3/39 (Item 10 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
(c) 2010 Gale/Cengage. All rights reserved.

07314869 **Supplier Number:** 14698414 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Apparel and fabricated textile products. (Industry Overview)

Tucker, Joanne; Corey, Maria
U.S. Industrial Outlook , p32-1(10)
Annual , 1994
Document Type: Industry Overview
ISSN: 0083-1344

Language: ENGLISH
Record Type: FULLTEXT; ABSTRACT
Word Count: 4545 **Line Count:** 00380

12/3/40 (Item 11 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
(c) 2010 Gale/Cengage. All rights reserved.

06722783 **Supplier Number:** 14480385 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Managing a powder-coating shop: how an Oregon finisher takes the guessing out of pricing.

Industrial Finishing , v69 , n9 , p17(4)
Sept , 1993
ISSN: 0019-8323
Language: ENGLISH
Record Type: FULLTEXT; ABSTRACT
Word Count: 2821 **Line Count:** 00221

12/3/41 (Item 12 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
(c) 2010 Gale/Cengage. All rights reserved.

06515874 **Supplier Number:** 14028204 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Paper and allied products. (Industry Overview)

Smith, Leonard; Stanley, Gary L.
U.S. Industrial Outlook , p10-1(23)
Annual , 1993
Document Type: Industry Overview
ISSN: 0083-1344
Language: ENGLISH
Record Type: FULLTEXT
Word Count: 20913 **Line Count:** 01726

12/3/42 (Item 13 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
(c) 2010 Gale/Cengage. All rights reserved.

06219806 **Supplier Number:** 13277508 (USE FORMAT 7 OR 9 FOR FULL TEXT)
U.S. mergers and acquisitions. (The M&A Rosters: First Quarter 1992)

Mergers & Acquisitions , 27 , n1 , 65(69)
July-August , 1992

ISSN: 0026-0010

Language: ENGLISH

Record Type: FULLTEXT

Word Count: 79730 Line Count: 07395

12/3/43 (Item 14 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

(c) 2010 Gale/Cengage. All rights reserved.

05906145 Supplier Number: 12392161 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Network dyads in entrepreneurial settings: a study of the governance of exchange relationships. (includes appendix)

Larson, Andrea

Administrative Science Quarterly , v37 , n1 , p76(29)

March , 1992

ISSN: 0001-8392

Language: ENGLISH

Record Type: FULLTEXT; ABSTRACT

Word Count: 13503 Line Count: 01155

12/3/44 (Item 15 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

(c) 2010 Gale/Cengage. All rights reserved.

05522212 Supplier Number: 11552075 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Authority control in a bilingual OPAC: MultiLIS at Laurentian. (bilingual online public access catalog, a MultiLIS system at Laurentian University in Northern Ontario)

Slater, Ron

Library Resources & Technical Services , v35 , n4 , p422(37)

Oct , 1991

ISSN: 0024-2527

Language: ENGLISH

Record Type: FULLTEXT

Word Count: 9879 Line Count: 00838

12/3/45 (Item 16 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

(c) 2010 Gale/Cengage. All rights reserved.

05438376 Supplier Number: 11080382 (USE FORMAT 7 OR 9 FOR FULL TEXT)

A buyers' guide to software for purchasing. (buyers guide)

Purchasing , v111 , n1 , p77(5)

July 18 , 1991

Document Type: buyers guide

ISSN: 0033-4448

Language: ENGLISH

Record Type: FULLTEXT

Word Count: 5704 **Line Count:** 00501

12/3/46 (Item 17 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

(c) 2010 Gale/Cengage. All rights reserved.

04500908 **Supplier Number:** 08049130 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Third annual 1990 directory of human resources services, products and suppliers.
(directory)

Personnel , v67 , n1 , p41(109)

Jan , 1990

Document Type: directory

ISSN: 0031-5702

Language: ENGLISH

Record Type: FULLTEXT; ABSTRACT

Word Count: 105313 **Line Count:** 10071

12/3/47 (Item 1 from file: 275)

DIALOG(R)File 275: Gale Group Computer DB(TM)

(c) 2010 Gale/Cengage. All rights reserved.

02066769 **Supplier Number:** 19436566 (Use Format 7 Or 9 For FULL TEXT)

Setting up shop on the Web. (IBM's Net.Commerce 1.0, iCAT Electronic Commerce Suite 3.0, Microsoft Merchant Server 1.0 Internet/web server packages) (includes term glossary and related article on commerce tips) (Software Review)(Evaluation)

Strom, David

Windows Sources , v5 , n6 , p167(5)

June , 1997

Document Type: Evaluation

ISSN: 1065-9641

Language: English **Record Type:** Fulltext; Abstract

Word Count: 3631 **Line Count:** 00283

12/3/48 (Item 2 from file: 275)

DIALOG(R)File 275: Gale Group Computer DB(TM)

(c) 2010 Gale/Cengage. All rights reserved.

01965435 **Supplier Number:** 18548007

Nexpo '96, II: editorial and advertising systems and electronic publishing. (includes related article on Freedom System Integrators' addition of Phrasea to its product line) **(Industry Trend or Event)**

Tribute, Andrew; Edwards, Stephen; Rossello, Rosanne; Drennan, Bill; Fischer, Christina
Seybold Report on Publishing Systems , v25 , n21 , p3(51)

July 29 , 1996

ISSN: 0736-7260

Language: English **Record Type:** Fulltext

Word Count: 41501 **Line Count:** 03239

12/3/49 (Item 3 from file: 275)

DIALOG(R)File 275: Gale Group Computer DB(TM)

(c) 2010 Gale/Cengage. All rights reserved.

01804827 **Supplier Number:** 17155740 **(Use Format 7 Or 9 For FULL TEXT)**

Tools and utilities.(1995 Database Buyer's Guide and client/server sourcebook)(Buyers Guide)

DBMS , v8 , n6 , p72(29)

May 15 , 1995

Document Type: Buyers Guide

ISSN: 1041-5173

Language: English **Record Type:** Fulltext; Abstract

Word Count: 45154 **Line Count:** 03869

12/3/50 (Item 4 from file: 275)

DIALOG(R)File 275: Gale Group Computer DB(TM)

(c) 2010 Gale/Cengage. All rights reserved.

01605455 **Supplier Number:** 14007293 **(Use Format 7 Or 9 For FULL TEXT)**

Xerox's DocuTech: 'print shop' all in one. (includes glossary of printing terms, and related articles on printing this issue using DocuTech and using a Xerox DocuTech service bureau to print a smaller job)

Smith, Patricia J.

Seybold Report on Publishing Systems , v22 , n18 , p3(18)

June 22 , 1993

ISSN: 0736-7260

Language: ENGLISH **Record Type:** FULLTEXT

Word Count: 13880 **Line Count:** 01061

12/3/51 (Item 5 from file: 275)
DIALOG(R)File 275: Gale Group Computer DB(TM)
(c) 2010 Gale/Cengage. All rights reserved.

01522280 **Supplier Number:** 12335096 (Use Format 7 Or 9 For FULL TEXT)
MacUser minifinders: 1001 Macintosh products. (Buyers Guide)

MacUser , v8 , n8 , p87(52)
August , 1992
Document Type: Buyers Guide
ISSN: 0884-0997
Language: ENGLISH **Record Type:** FULLTEXT; ABSTRACT
Word Count: 77991 **Line Count:** 06173

12/3/52 (Item 6 from file: 275)
DIALOG(R)File 275: Gale Group Computer DB(TM)
(c) 2010 Gale/Cengage. All rights reserved.

01464520 **Supplier Number:** 11588474 (Use Format 7 Or 9 For FULL TEXT)
Resolving differences.(between vendor and purchaser) (Strategies; includes related articles on steps to take, how to avoid problems, resources and using credit cards)

Grotta, Daniel
PC Sources , v2 , n12 , p228(9)
Dec , 1991
ISSN: 1052-6579
Language: ENGLISH **Record Type:** FULLTEXT; ABSTRACT
Word Count: 6143 **Line Count:** 00482

12/3/53 (Item 7 from file: 275)
DIALOG(R)File 275: Gale Group Computer DB(TM)
(c) 2010 Gale/Cengage. All rights reserved.

01439758 **Supplier Number:** 10957512 (Use Format 7 Or 9 For FULL TEXT)
MiniFinders. (buyer's guide to Apple Macintosh hardware and software) (buyers guide)

MacUser , v7 , n8 , p135(49)
August , 1991
Document Type: buyers guide
ISSN: 0884-0997
Language: ENGLISH **Record Type:** FULLTEXT
Word Count: 80288 **Line Count:** 06476

12/3/54 (Item 1 from file: 636)
DIALOG(R)File 636: Gale Group Newsletter DB(TM)
(c) 2010 Gale/Cengage. All rights reserved.

03898073 **Supplier Number:** 50064143 **(USE FORMAT 7 FOR FULLTEXT)**

BOOK ON THE WORLD WIDE WEB: ISSUES AND TRENDS

Online Libraries & Microcomputers , v 16 , n 6-7 , p N/A
June 1 , 1998

Language: English **Record Type:** Fulltext
Document Type: Newsletter ; Professional Trade
Word Count: 2647

12/3/55 (Item 1 from file: 624)
DIALOG(R)File 624: McGraw-Hill Publications
(c) 2010 McGraw-Hill Co. Inc. All rights reserved.



0025586
Manufacturers' Literature
Engineering News-Record, Vol. 217, No. 25, Pg 74
December 18, 1986
JOURNAL CODE: ENR
SECTION HEADING: Manufacturers' Literature ISSN: 0013-807X
WORD COUNT: 3,736

12/3/56 (Item 1 from file: 635)
DIALOG(R)File 635: Business Dateline(R)
(c) 2010 ProQuest Info&Learning. All rights reserved.

0698581 96-55926
International Trade Roundtable

Anonymous
Central New York Business Journal (DeWitt , NY , US) , V 10 N 9 p 12
Publication Date: 960429
Word Count: 5,728
Dateline: Syracuse, NY, US, Middle Atlantic

12/3/57 (Item 1 from file: 638)
DIALOG(R)File 638: Newsday/New York Newsday
(c) 2010 Newsday Inc. All rights reserved.

09344005

PLUGGED IN: THE 1997 BUYING GUIDE / The Virtual Mall Click, Pay / Web shoppers may spend more than \$1 billion this season.

Newsday (ND) - Wednesday December 10, 1997

By: Bob Rankin. SPECIAL CORRESPONDENT

Edition: ALL EDITIONS **Section:** PLUGGED IN **Page:** C08

Word Count: 1,414

12/3/58 (Item 1 from file: 704)

DIALOG(R)File 704: (Portland)The Oregonian

(c) 2010 The Oregonian. All rights reserved.

10597281

SAFE SHOPPING ONLINE

Oregonian (PO) - Thursday, April 6, 2000

Edition: SUNRISE **Section:** GRAPHICS **Page:** B06

Word Count: 312

12/3/59 (Item 1 from file: 47)

DIALOG(R)File 47: Gale Group Magazine DB(TM)

(c) 2010 Gale/Cengage. All rights reserved.

06006549 **Supplier Number:** 70368452 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Interlibrary Loan and Resource Sharing Products: An Overview of Current

Features and Functionality.

Jackson, Mary E.

Library Technology Reports , 36 , 6 , 1

Nov , 2000

ISSN: 0024-2586

Language: English **Record Type:** Fulltext

Word Count: 80775 **Line Count:** 06653

12/3/60 (Item 2 from file: 47)

DIALOG(R)File 47: Gale Group Magazine DB(TM)

(c) 2010 Gale/Cengage. All rights reserved.

05802986 **Supplier Number:** 62087872 (USE FORMAT 7 OR 9 FOR FULL TEXT)

THE STATUS OF LIBRARY AUTOMATION AT 2000.(Statistical Data Included)

Saffady, William

Library Technology Reports , 36 , 1 , 3
Jan , 2000

Document Type: Statistical Data Included
ISSN: 0024-2586

Language: English **Record Type:** Fulltext
Word Count: 41545 **Line Count:** 03698

12/3/61 (Item 3 from file: 47)
DIALOG(R)File 47: Gale Group Magazine DB(TM)
(c) 2010 Gale/Cengage. All rights reserved.

05513717 **Supplier Number:** 57800482 (USE FORMAT 7 OR 9 FOR FULL TEXT)
INTEGRATED LIBRARY SYSTEM SOFTWARE FOR SMALLER LIBRARIES.

Beiser, Karl A.
Library Technology Reports , 35 , 4 , 365

July , 1999
ISSN: 0024-2586

Language: English **Record Type:** Fulltext
Word Count: 82294 **Line Count:** 06591

12/3/62 (Item 4 from file: 47)
DIALOG(R)File 47: Gale Group Magazine DB(TM)
(c) 2010 Gale/Cengage. All rights reserved.

05407731 **Supplier Number:** 55283447 (USE FORMAT 7 OR 9 FOR FULL TEXT)
INTEGRATED LIBRARY SYSTEM SOFTWARE FOR SMALLER LIBRARIES.(Software Review)(Evaluation)

Beiser, Karl A.
Library Technology Reports , 35 , 2 , 119

March , 1999

Document Type: Evaluation
ISSN: 0024-2586

Language: English **Record Type:** Fulltext; Abstract
Word Count: 48241 **Line Count:** 03882

12/3/63 (Item 5 from file: 47)
DIALOG(R)File 47: Gale Group Magazine DB(TM)
(c) 2010 Gale/Cengage. All rights reserved.

05293272 **Supplier Number:** 53501780 (USE FORMAT 7 OR 9 FOR FULL TEXT)
GUIDE TO OUTSOURCING IN LIBRARIES.(Industry Overview)

Library Technology Reports , 34 , 5 , 559(1)
Sept , 1998

Document Type: Industry Overview

ISSN: 0024-2586

Language: English **Record Type:** Fulltext; Abstract

Word Count: 24643 **Line Count:** 02871

12/3/64 (Item 6 from file: 47)

DIALOG(R)File 47: Gale Group Magazine DB(TM)

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05076978 **Supplier Number:** 19581028 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Ameritech Library Services.(Vendors of Integrated Library Systems for
Minicomputers and Mainframes: An Industry Report, part 1)

Saffady, William

Library Technology Reports , v33 , n2 , p143(17)

March-April , 1997

ISSN: 0024-2586

Language: English **Record Type:** Fulltext; Abstract

Word Count: 8455 **Line Count:** 00741

12/3/65 (Item 7 from file: 47)

DIALOG(R)File 47: Gale Group Magazine DB(TM)

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04833457 **Supplier Number:** 19761240 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Vendors of integrated library systems for minicomputers and mainframes: an
industry report, part 2(part 2: Geac Computers Inc., Innovative Interfaces Inc.,
VTLS Inc. and bibliographic references)(Company Profile)

Saffady, William

Library Technology Reports , v33 , n3 , p331(60)

May-June , 1997

Document Type: Company Profile

ISSN: 0024-2586

Language: English **Record Type:** Fulltext; Abstract

Word Count: 26345 **Line Count:** 02250

12/3/66 (Item 8 from file: 47)

DIALOG(R)File 47: Gale Group Magazine DB(TM)

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04833456 **Supplier Number:** 19761239 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Vendors of integrated library systems for minicomputers and mainframes: an industry report, part 2.(part 1: Contec Data Systems, Data Research Associates, Endeavor Information Systems, EOS International, Fretwell Downing Informatics)(Company Profile)

Saffady, William
Library Technology Reports , v33 , n3 , p277(50)
May-June , 1997
Document Type: Company Profile
ISSN: 0024-2586
Language: English **Record Type:** Fulltext; Abstract
Word Count: 22345 **Line Count:** 01943

12/3/67 (Item 9 from file: 47)
DIALOG(R)File 47: Gale Group Magazine DB(TM)
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04081862 **Supplier Number:** 15843422 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Integrated library systems for microcomputers and mainframes: a vendor study. (part 2)

Saffady, William
Library Technology Reports , v30 , n2 , p157(162)
March-April , 1994
ISSN: 0024-2586
Language: ENGLISH **Record Type:** FULLTEXT; ABSTRACT
Word Count: 69899 **Line Count:** 06089

12/3/68 (Item 10 from file: 47)
DIALOG(R)File 47: Gale Group Magazine DB(TM)
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04075561 **Supplier Number:** 15415808 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Integrated library systems for microcomputers and mainframes: a vendor study. (part 1)

Saffady, William
Library Technology Reports , v30 , n1 , p5(141)
Jan-Feb , 1994
ISSN: 0024-2586
Language: ENGLISH **Record Type:** FULLTEXT; ABSTRACT
Word Count: 60348 **Line Count:** 05244

? t s12/6,k/all

>>> Retrying request [1]
12/6,K/1 (Item 1 from file: 610)
DIALOG(R)File 610: Business Wire
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00442039 20010116016B0498 (USE FORMAT 7 FOR FULLTEXT)
LP Selects Metiom to Build Corporate E-Procurement Platform; Building Products Supplier to Move Corporate Purchasing to the Web for Increased Efficiency and Cost Benefits

Tuesday, January 16, 2001 08:33 EST

Word Count: 759

Text:

...said Jeff Wagner Director of Supply Management for LP. "The opportunity to utilize Metiom's ability to link our end-users to our preferred suppliers' **catalogs**, commonly referred to as the "punch-out approach," was not only very appealing to us but also to our very diverse supply base," he added...

...ConnectTrade(TM) product suite enables electronic inter-networking of buyers and suppliers by allowing purchasers to order goods and services online directly from suppliers' electronic **catalogs**. Metiom ConnectTrade products fully support leading Internet commerce standards and are easily integrated into a buying organization's existing systems. The Metiom ConnectTrade solution powers...

...technological sophistication can trade. Each Metiom -Powered marketplace allows buyers to search, compare and purchase goods and services from a vast array of suppliers, create **purchase orders** and choose a payment method, track and control their purchasing. And suppliers have the unique ability to manage the look, feel and content of their own **catalog**.

"Mtiom and LP seems like a good partnership to reach a large group of disaggregated suppliers that likely covers the spectrum of e-Business experience. Metiom's Supplier Managed **Catalog** and its e-**catalog** building tool should provide LP suppliers with a quick and easy-to-use B2B system that can yield substantial savings and efficiency gains for LP...

...to deliver the true promise of B2B e-commerce. Metiom ConnectTrade automates corporate purchasing online, and is based on open standards,

real-time Supplier-Managed **Catalogs**™ and Point-and-Click Purchasing™.
Metiom solutions deliver the easiest and fastest way to dramatically reduce the high cost of enterprise purchasing, while...

...risks, uncertainties and assumptions that may cause actual results to differ materially from those projected, including, but not limited to, the effect of general economic conditions, including the level of interest rates and housing starts, market demand for the company's products, and prices for structural products; the effect of forestry, land use, environmental and other governmental regulations; the ability to obtain regulatory approvals, and the risk of losses from fires, floods and other natural disasters. These and other factors that could cause...

12/6/K/2 (Item 2 from file: 610)
DIALOG(R)File 610: Business Wire
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**00413692 20001120325B1577 (USE FORMAT 7 FOR FULLTEXT)
Delta Financial Corporation Launches Senior Notes Exchange Offer**

Monday , November 20, 2000 16:18 EST
Word Count: 9,389

Text:

...fiscal 1999.

Net interest income was \$0.5 million in the third quarter of both fiscal 2000 and fiscal 1999. The Company had an income **tax** benefit of \$0.5 million in the third quarter of fiscal 2000 and a provision for income **taxes** of \$0.5 million in the third quarter of fiscal 1999.

The Company incurred a net loss of \$1.1 million in the third quarter...

...first nine months of fiscal 2000 and \$1.3 million in the first nine months of fiscal 1999.

The Company had a provision for income **taxes** of \$2.2 million in the first nine months of fiscal 2000 and of \$7.0 million in the first nine months of fiscal 1999...outstanding amount of its letters of credit and its revolving loans, if any, and (y) at CIT's option, the sum of (i) unpaid sales **taxes**, and (ii) up to \$500,000 in total liabilities of the Companies under permitted encumbrances (as defined in the Financing Agreement). The borrowing base, as to any of the Companies, is the sum of (x) a percentage of the book value of its eligible inventory (both on hand and unfilled **purchase orders** financed with letters of credit), ranging from 60% to 65% depending on the season, and (y) the balance in an account in its name that...

...for the next 12 months to meet its cash requirements, including (i) anticipated working capital needs, including seasonal inventory financing, (ii) the cost of distributing **catalogs**, (iii) the cost of marketing internet test sites (see "Shop @ Home") and (iv) store construction costs (see, "Stores"). This paragraph constitutes forward-looking information under...

...factors referred to under the caption "Future Results".

SHOP @ HOME

The Company intends to enter a new channel of distribution for its merchandise, internet and **catalog** sales ("shop @ home"), in order to expand its customer base and attract more business from its existing customers.

The Company has operated a test site (www.cloudwalkers.com) for the sale of its Cloudwalkers(R) brand women's shoes on the internet since the third quarter of fiscal 1999. **Catalogs** for Cloudwalkers(R) have also been tested. The Company began testing **catalogs** for AVENUE(R) merchandise in September 2000. The Company launched a test site (www.avenue.com) on November 17, 2000 for the sale of its...

...to the uncertainties and other risk factors referred to under the caption "Future Results."

There is no assurance of gross profit on shop @ home sales.

TAX MATTERS

The Company's federal income **tax** returns for fiscal 1994, fiscal 1995 and fiscal 1996 were audited by the ...Taiwan, (c) North Korea's claims to sovereignty over South Korea, (d) exchange rate fluctuations, (e) trade sanctions or restrictions, (f) changes in quota and **duty regulations**, (g) delays in shipping, or (h) increased costs of transportation.

ITEM 6. EXHIBITS AND REPORTS ON FORM 8-K.

The following exhibits are filed herewith...increased the total financing from \$935,000 to \$2,285,000. In addition, the Credit Agreement was further amended, subsequent to June 30, 1998, to **include** under its **terms** the \$500,000 demand loan to the Company from Prospect Street in June 1997.

In addition to the foregoing, as of September 30, 2000, the...Of the \$177,000 write-down, \$143,000 directly related to properties located in Kingsport, Tennessee where the Savings Bank no longer solicits business.

Income Taxes. The Company recognized an income **tax** credit for the - three-month period ended September 30, 2000 of \$276,000 compared to an income **tax** expense of \$83,000 for the three-month period ended September 30, 1999. The changes in income **tax** expense are a result of changes in net taxable income during the periods and the change in accounting for **tax** estimates for the Company individually.

LIQUIDITY AND CAPITAL RESOURCES

The Company currently has no business other than that of the Savings Bank and does not...

...The Savings Bank is subject to various regulatory restrictions on the payment of dividends.

The Savings Bank is required by the Office of Thrift Supervision **regulations**

to maintain minimum levels of specified liquid assets. On November 24, 1997, the OTS lowered this liquidity requirement from 5 to 4 percent of the...

12/6,K/3 (Item 3 from file: 610)
DIALOG(R)File 610: Business Wire
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00385297 20001016290B2085 (USE FORMAT 7 FOR FULLTEXT)
webMethods Delivers B2B Adapter for Use with J.D. Edwards' WorldSoftware; CE Franklin Ltd. First Customer to Deploy Solution-New Adapter Offers CE Franklin Seamless Business-to-Business Integration Between Their WorldSoftware...

Monday, October 16, 2000 08:05 EDT
Word Count: 1,301

Text:

...subsidiary of PSDI (Nasdaq: PSDI). As a supplier using the MRO.COM branded marketplace, CE Franklin needs to provide buyers the ability to search product **catalogs**, check product and pricing information, place **purchase orders** and check status of order requests. Using the webMethods B2B Adapter: J.D. Edwards' WorldSoftware Edition, CE Franklin can now leverage its existing IT infrastructure...

...assurance that expected results will be achieved. Important factors that could cause actual results to differ materially from those in the forward looking statements herein **include** economic **conditions**, seasonality of drilling activity, commodity prices for oil and gas, currency fluctuations and government **regulations**, and other risks and uncertainties as described in the Company's 1999 Annual Report on Form 20-F as filed with the United States Securities...

12/6,K/4 (Item 4 from file: 610)
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00374123 20000929273B0521 (USE FORMAT 7 FOR FULLTEXT)

e-MedSoft.com's U.K. Division to Preview Its e-Procurement Software at Exchange in Healthcare Information Conference

Friday , September 29, 2000 03:19 EDT

Word Count: 870

Text:

...time" purchasing,
thereby reducing the amount of inventory held at any one time.

Health-care staffs operating the application are able to browse a product **catalog** and select items to specific requirements and technical specifications from preapproved suppliers. Once the "virtual **shopping cart**" has been filled and the order placed, it is instantaneously passed into the requisitioning process for approval by an authorized user, thus empowering staff to...

...relate to management's expectations, intentions or beliefs concerning future plans, expectations, events and performance are "forward-looking" within the meaning of the federal securities **laws**. These forward-looking statements include assumptions, beliefs and opinions relating to the company's business and growth strategy based upon management's interpretation and analysis...

...assume that the company will be able to successfully develop and execute on its strategic relationships. Many known and unknown risks, uncertainties and other factors, **including** general economic **conditions** and risk factors detailed from time to time in news releases and the company's filings with the Securities and Exchange Commission, may cause these...

12/6/K/5 (Item 5 from file: 610)
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00354282 20000830243B9795 (USE FORMAT 7 FOR FULLTEXT)
WatchGuard Begins Japanese Language LiveSecurity Service; Broadcasts Focus On the Security Management Needs of WatchGuard Subscribers in Japan

Wednesday , August 30, 2000 20:04 EDT

Word Count: 6,997

Text:

...cost of our
products.

The PRC enjoys most-favored nation trading status granted by the United States, whereby the United States imposes the lowest applicable **tariffs** on exports to the United States. The United States annually reconsiders the renewal of most-favored nation trading status for the PRC. Pending approval by...

...If permanent normal trade relations were not established and the PRC's most-favored nation status were rescinded, there would be a substantial increase in **tariffs** imposed on goods of Chinese origin entering the United States, including those goods manufactured by us, which would have a material adverse impact on our...

...final judicial determination of the dispute, the restraining order will continue in effect as long as we refrain from making any further shipments under the **purchase order** that gave rise to the dispute. See "Legal Proceedings."
We are dependent on certain large OEM customers.

Our three largest OEM customers, Agfa, Kodak and...the PRC and Hong Kong became a Special Administrative Region of the PRC. We cannot predict how the PRC will interpret and implement the basic **law** that provides, in part, for the capitalist system and way of life to remain unchanged for 50 years. We can also not predict the effect

...
...significant changes affecting our operations or financial condition in the PRC or Hong Kong could have a material adverse effect on our business and financial **condition**.

The **importation** of products into the United States and other countries in which our products are sold is subject to various other risks.

The United States, the...

...various multilateral and bilateral agreements. We cannot predict whether the United States will take future trade actions against the PRC that may result in increased **tariffs** against PRC products, including products imported by us.

The market price of our common stock may fluctuate. The stock markets, and in particular the Nasdaq...knowledge of the industry and its relationships with leading consumer - driven organizations such as banks, retailers, major oil companies, mortgage companies, direct response television companies, **catalog** companies and e-commerce companies, that it is a leading designer and provider of innovative membership service programs. The Company addresses the needs of organizations...

...s programs are primarily marketed to customers through arrangements with its client organizations including banks, retailers, major oil companies, mortgage companies, direct response television companies, **catalog** companies and e-commerce companies. Businesses that sell services and products to consumers have substantially increased the use of direct marketing techniques to reach their...

...Historically, a substantial number of the businesses that utilize membership service programs have been issuers of credit cards. More recently, however, other businesses, including retailers, **catalog** companies, e-commerce companies, banks, insurance companies and direct response television companies have also begun to offer service programs. In many cases, these businesses lack...

...the latest products in consumer electronics, personal computers and home entertainment; 24 hour protection services; personal information monitoring services; personal businesses consulting services; personal finance, **tax**, insurance and retirement planning services; credit card registration services such as one-call urgent stop notices, fraud reimbursement and emergency cash services and access to...9, 2000, the Company was required to file a registration statement on Form S-2 under the Securities Act and under all applicable Blue Sky **laws** covering the

Common Stock. By August 26, 2000, the Company is required to have caused such registration statement to be declared effective by the SEC...

12/6,K/6 (Item 6 from file: 610)
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00345488 20000816229B0678 (USE FORMAT 7 FOR FULLTEXT)
HearMe Executive VP Interviews On RadioWallStreet.com

Wednesday , August 16, 2000 17:30 EDT
Word Count: 22,411

Text:

...and Belgo Group PLC
in addition to start up expenses associated with a third joint venture
restaurant opened in the second quarter of 2000.

Income **tax** benefit represents the effective rate of benefit on loss
before
income **taxes** for the first six months of 2000. The **tax** rate
is based on the
Company's expected rate for the full fiscal 2000 year.

Net loss for the six-month period ended July 2...Condition and
Results of Operations ("MD&A") section of the Form 10-K under the
"Overview," "Quantitative and Qualitative Disclosures About Market
Risk,"

"FDA
Regulations," and "Recent Developments" headings,

(4) elsewhere in the Business, MD&A, and other sections of the Form
10-K,

(5) and in this Form...in conjunction with the
Company and Direct Radiography Corp., would build digital radiography
products
for Kodak. In February 2000, Analogic provided a \$5.4 million
purchase order
for more than 50 systems. The Company delivered ten systems under this
purchase order during the first six months of 2000. While the
Company, Kodak
and Analogic continue to work together to deliver these systems, there
is
no
formal...

...Company is subject to periodic inspections by the Food and Drug Administration, whose primary purpose is to audit the Company's compliance with Quality System **Regulations**, which include testing, quality control and documentation procedures. In March 1995, the Company's Denver facility received a Warning Letter from the FDA concerning documentation...and administrative

9.3

8.1 9.0 8.7

Income (Loss) from Operations	4.7
(6.3) 4.3 (7.2)	
Benefit for income taxes	-----
-----	-----
Net income (loss)	3.9

(7.3) 3.2 (9.0)

* Based on normalized results of operations. See "Results of Operations, Excluding Restructuring Charge and...an increase in production of higher margin mammography and digital radiology products and efficiencies and cost savings derived from corporate right-sizing and reorganization.

Income **Taxes**

The Company's estimated effective **tax** rate for the year ended December 31, 2000 is currently 0%. Accordingly, no income **tax** benefit or provision has been recorded for the three or six month periods ended July 2, 2000. This rate was determined based upon the anticipated 2000 results of operations includable in the domestic consolidated **tax** return and upon projected net temporary differences between operating results reflected in the financial statements and those required to be reflected in the 2000 domestic consolidated **tax** return. As of December 31, 1999, the Company had valuation allowances of approximately \$10.3 million, reducing net deferred **tax** assets to \$0. The realizability of net deferred **tax** assets is dependent on the Company's ability to generate future taxable income, and the Company's estimate of realizable

deferred **tax** assets may change in the near future.

No income **tax** provisions have been recognized for foreign **tax** jurisdictions and no income **tax** benefits have been recognized for subsidiary losses outside the domestic consolidated return because they are not expected to reverse in the foreseeable future.

Liquidity and...potential workers' compensation claims and required payments, risks from employer/employee suits such as discrimination or wrongful termination, risks associated with payroll and employee related **taxes** which may require unanticipated payments by the Company, liabilities associated with the company's status under certain federal and state employment **laws** as a co-employer, effects of competition, the Company's ability to implement its internet based business and technological changes and dependence upon key personnel...291, 000 to \$1,094,000 from \$803,000 in the nine months ended June 30, 1999, due to the TeamStaff and Synadyne acquisitions.

Income **taxes** for the quarter ended June 30, 2000 reflected a **tax** benefit of \$127,000 versus a **tax** expense of \$451,000 for the similar period last year. The third quarter of fiscal 2000 includes \$185,000 **tax** credit earned on certain employees' wages. Income **tax** expense for the nine months ended June 30, 2000 and 1999 were \$432,000 and \$446,000, respectively. Included in the second quarter of fiscal 1999 was a \$400,000 net **tax** benefit reflecting the elimination of a deferred **tax** valuation allowance.

Net income for the quarter ended June 30, 2000 was \$310,000, or \$0.04 per fully-diluted share, as compared to \$489...

...2000 would have been \$1,212,000, or \$0.15 per fully-diluted share. After adjusting for the same workers' compensation adjustments and the deferred **tax** item, as previously discussed, net income for the nine months ended June 30, 1999 would have been

\$777,000, or \$0.11 per fully-diluted...up from 9.0% at December 31, 1999.

This increase reflects a growing portion of the Company's business originating in areas where longer payment **terms** are customary, **including** a growing contribution from international markets as well as large system enterprise sales primarily associated with Silicon products. Write-offs of uncollectible accounts have historically...

...of the patent licenses was recognized in the Company's statement of income for the second quarter of 2000 as a special charge to **pre-tax** earnings of \$30.4 million, including direct expenses of \$1.9 million. The remaining balance of \$19.5 million has been classified on the consolidated...

...spending primarily reflects increased numbers of software and hardware engineers and costs associated with new product development and engineering support.

Other Income, Net and Income Taxes Other income is comprised principally of interest income, which increased from 1999 to 2000 due to higher average cash balances available for investment during 2000.

The Company's effective income **tax** rates were approximately 29.0% and 29.5% for the quarters and six month periods ended July 2, 2000 and June 27, 1999, respectively. The decrease in the effective **tax** rate from last year is due to the expected **tax** savings from an increasing portion of taxable earnings being generated from the Company's operations in jurisdictions currently having a lower income **tax** rate than the present U.S. statutory income **tax** rate.

LIQUIDITY AND CAPITAL RESOURCES

Working capital at July 2, 2000 was \$698.1 million compared to \$706.0 million at December 31, 1999. The...5.4

----- -----

----- -----

Operating income	(2.2)	4.8
.7 5.4		
Interest expense	5.5	5.5
4.9 5.3		
-----	-----	-----
-----	-----	-----
Income (loss) before income taxes and extraordinary items	(77)	(0.7)
(4.2) .1		
Income tax benefit	(1.0)	--
(0.6) --		
-----	-----	-----
-----	-----	-----
Loss before extraordinary items	(6.7)	(0.7)
(3.6) .1		
Extraordinary items	(2.1)	--
(1.0) --		
-----	-----	-----
-----	-----	-----

Net income (loss...in 2000 and
\$600,000 in 1999, which represents the accrual of the compound effect
of
the
interest associated with the Series B notes.

INCOME **TAX** (BENEFIT). We did not record additional **tax**
expense (benefit)
associated with the operating loss in 2000 due to the uncertainty of
the
future utilization of the deferred income **tax** asset.

EXTRAORDINARY ITEMS. The extraordinary item related to the expensing of
certain deferred financing costs associated with the early payoff of
certain
debt obligations.

NET...income of \$24.1 million and a
decrease in total noninterest income of \$6.9 million, which was
partially
offset by a decrease in income **taxes** of \$2.9 million.

INTEREST INCOME. Interest income decreased \$19.3 million, or 20.0%, from \$96.2 million at June 30, 1999 to \$76...Gains on the sales of loans and real estate generally are dependent on various factors which are not necessarily within the control of the Company, including market and economic **conditions**. As a result, there can be no assurance that the gains on sales of loans and real estate reported by the Company in prior periods...
...of \$18.1 million and a decrease in total non-interest income of \$5.3 million, which was partially offset by a decrease in income **taxes** of \$1.5 million and a decrease in noninterest expense of \$579,000.

INTEREST INCOME. Interest income decreased \$14.7 million, or 27.2%, from...
distributors, original equipment manufacturers ("OEMs"), government, consumer and international. The general distributors are comprised of industrial distributors, rigging shops and crane builders. Specialty distributors include **catalog** houses, material handling specialists and entertainment riggers. The service-after-sale network includes repair parts distribution centers, chain service centers, and hoist repair centers. Consumer...
...The increase in the current year fiscal quarter is the result of the investment earnings on assets in the Company's captive insurance company.

Income **taxes** as a percentage of income before income **taxes** were 50.6% and 50.2% in the fiscal 2001 and 2000 quarters, respectively. The percentages reflect the effect of nondeductible amortization of goodwill resulting...
2000 an increase of 678%.

Cost of Services

Cost of services consist of direct costs of servicing clients, including direct labor and related benefits and **taxes**, solution center facility costs, and direct production costs. Direct production costs include costs such as filming, animation, editing, special effects, photography and illustrations, artwork, computer...remaining publicly held Coleman shares in a merger transaction in which the remaining Coleman stockholders (other than

stockholders who are seeking appraisal rights under Delaware law) received 0.5677 of a share of the Company's common stock and \$6.44 in cash for each share of Coleman common stock they...of claims by Coleman public stockholders the Company issued to such Coleman public stockholders (other than such stockholders who are seeking appraisal rights under Delaware law), warrants expiring August 24, 2003 to purchase 4.98 million shares of the Company's common stock at \$7.00 per share less approximately 498...

12/6,K/7 (Item 7 from file: 610)
DIALOG(R)File 610: Business Wire
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00273679 20000508129B4216 (USE FORMAT 7 FOR FULLTEXT)
e-MedSoft.com Implements Revolutionary e-Procurement System in Wales; Welsh Health Supplies Represents 135 Hospitals throughout Region

Monday , May 8, 2000 03:45 EDT
Word Count: 916

Text:

...Division in the past two months.

e-MedSoft.com's system streamlines the procurement process by allowing nurses on a ward to browse a product **catalog** and select items according to specific requirements and technical specification. Once the virtual '**shopping cart**' has been filled and the user has placed the order, it will be instantaneously passed into the requisitioning process for approval by an authorized user
...

...relate to management's expectations, intentions or beliefs concerning future plans, expectations, events and performance are "forward-looking" within the meaning of the federal securities **laws**. These forward-looking statements include assumptions, beliefs and opinions relating to the company's business and growth strategy based upon

management's interpretation and analysis...

...assume that the company will be able to successfully develop and execute on its strategic relationships. Many known and unknown risks, uncertainties and other factors, including general economic conditions and risk factors detailed from time to time in news releases and the company's filings with the Securities and Exchange Commission, may cause these...

12/6/K8 (Item 8 from file: 610)
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00115235 19991006279B1262 (USE FORMAT 7 FOR FULLTEXT)
iMALL Introduces iSTORE Wizard, Next- Generation Web Store Building Tool; Suite of E-Commerce Services Continues to Expand

Wednesday , October 6, 1999 09:23 EDT
Word Count: 650

Text:

...enables a merchant to go online and follow a step-by-step process to create a fully featured store that includes iMALL's sophisticated global shopping cart, cash register technology, and electronic wallet. Stores are automatically configured to use the First Data Corp. (NYSE:FDC) SurePay^(SM) payment gateway and graphical order...

...pre-formatted pages, insertion of products, pricing and product information
-- Standard Web site design themes and layouts in template format
-- Cash register included for sales tax, credit card, and e-check acceptance
-- Powerful iMALL product catalog functionality
-- Supports up to 100 products per store

"iSTORE Wizard gives merchants a migration path from building a simple 'brochure' site to a full e...

...iMALL and Excite@Home (Nasdaq:ATHM) executed a definitive agreement for the acquisition of iMALL by Excite@Home. The transaction is subject to customary closing conditions, including approval by the shareholders of iMALL.

The transaction is expected to close in the 4th quarter of 1999.

Certain of the above statements may be...

12/6/K/9 (Item 1 from file: 20)
DIALOG(R)File 20: Dialog Global Reporter
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76430178 (USE FORMAT 7 OR 9 FOR FULLTEXT)

www.standoutstocks.com: Stocks That Stand Out For Jan. 22nd, 2010 Are Jan 22, 2010 SymPowerco Corporation (PINKSHEETS: SYMW), Jan 22, 2010 Gen2Media Corporation (OTC Bulletin Board: GTWO), Jan 22, 2010 China Crescent Enterprises, Inc. (OTC Bulletin Board:

January 22, 2010

Word Count: 3221

(USE FORMAT 7 OR 9 FOR FULLTEXT)

...Town Hall presentation, China Crescent CEO Paul K. Danner provides a review of the Company's 2009 performance and successful launch of its Outsourcing Services **including** two substantial, long-term contracts. Additionally, the presentation provides an overview of recently announced plans to expand into new business lines, the acquisition of a China Radio Technology Ltd...is updated with new airtimes when cable channels announce them to the Company. While you're on the website, check out our easy to use **shopping cart** and buy Ionic Bulbs for yourself, family and friends." About the Company: Zevotek, Inc. plans to market and sell a range of innovative personal and...

...use compact fluorescent light bulb (CFL).The Company sells the Ionic Bulb through TV infomercials and the Internet and plans to market Ionic Bulbs through **catalogs**, magazines and major U.S. retail and specialty stores. The Company's new 2 minute Ionic Bulb TV ad is designed to air on national...

...be relied upon as of any subsequent date. Zevotek, Inc. cautions readers not to place undue reliance on such statements. Unless otherwise required by applicable **law**, Zevotek, Inc. does not undertake, and Zevotek, Inc. specifically disclaims any obligation to update any forward-looking statements to reflect occurrences, developments, unanticipated events or...

20100122

12/6,K/10 (Item 2 from file: 20)
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13310883 (USE FORMAT 7 OR 9 FOR FULLTEXT)
webMethods Delivers B2B Adapter for Use with J.D. Edwards' WorldSoftware; CE Franklin Ltd. First Customer to Deploy Solution

October 16, 2000

Word Count: 1283

(USE FORMAT 7 OR 9 FOR FULLTEXT)

...subsidiary of PSDI (Nasdaq: PSDI). As a supplier using the MRO.COM branded marketplace, CE Franklin needs to provide buyers the ability to search product **catalogs**, check product and pricing information, place **purchase orders** and check status of order requests. Using the webMethods B2B Adapter: J.D. Edwards' WorldSoftware Edition, CE Franklin can now leverage its existing IT infrastructure...assurance that expected results will be achieved. Important factors that could cause actual results to differ materially from those in the forward looking statements herein **include** economic **conditions**, seasonality of drilling activity, commodity prices for oil and gas, currency fluctuations and government **regulations**, and other risks and uncertainties as described in the Company's 1999 Annual Report on Form 20-F as filed with the United States Securities...

20001016

12/6,K/11 (Item 3 from file: 20)
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12316501 (USE FORMAT 7 OR 9 FOR FULLTEXT)
Infobank Int. Hldgs - Interim Results

August 09, 2000

Word Count: 3208

(USE FORMAT 7 OR 9 FOR FULLTEXT)

...12,000 for continuing operations in Q2 1999, and 60% up on Q1 2000; total revenue for the first half was #671,000

* The pre-**tax** loss for the first half of #9.97 million (1999: #3.2 million) was in line with expectations and reflects the expansion of

the Group...leveraging and extending investment in Enterprise Resource Planning systems. Scalable across all departments throughout the enterprise, this is targeted at organisations processing over 20,000 **purchase orders** per annum.

* InTrade Purchaser Business Edition - An SME solution providing smaller or fragmented organisations with internal, automated procurement.
Maximum of 25 users. Targeted at organisations processing between 2,500 and 20,000 **purchase orders** per annum.

* InTrade Supplier - Aimed at suppliers of all sizes, InTrade Supplier allows a supplier to automate and control its sales process on a customer specific basis and publish its electronic **catalogue** on the Web, enabling registered users to access it and buy goods, while maintaining supplier branding.

The entire InTrade product suite offers true single system...

...receivable and similar income 1,901 100 1,950 184 Interest payable and similar charges (2) (148) (2) (373)

(1,953

) (9,966) (3,200) **Tax on loss on ordinary activities** - (8) - (8)

(4,557

) (1,961) (9,966) (3,208)

===== (1
2.34
p)

(12.44

p) -----

Unaudited Unaudited Audited 30 June 30...3,208)

===== 26
,815
50,883 25,987 Dilutive share options ('000) (668) (90) (203) (194)

55,564

26,725 50,680 25,793

====

====

==== Investments include short-term deposits of #1.8 million held by the Infobank Employee Benefit Trust to cover future employee bonuses.

7. Share capital and reserves

Ordinary Share Other...

SIC Codes/Descriptions: 7372 (Prepackaged Software); 7375 (Information Retrieval Services); 5961 (Catalog & Mail Order Houses)

Naics Codes/Descriptions:

20000809

12/6,K/12 (Item 4 from file: 20)
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06813986 (USE FORMAT 7 OR 9 FOR FULLTEXT)
INDIA: NEWSPRINT MARKET (2)

June 19, 1999

Word Count: 3234

(USE FORMAT 7 OR 9 FOR FULLTEXT)

...monthly magazines or newspapers for sale. Currently, such imports are being used for journals published to promote the sale of goods and services; price lists; **catalogs**; directories; lottery news and racing guides.

The newspaper industry has invested in new assets over the first half of the 1990's, financing these assets...

...Journalists showed a boom in the profits of the newspaper industry over the past few years.

Newsprint manufactured by indigenous mills is free from excise **duty** when it is purchased by newspapers registered with the Registrar of Newspapers for India (RNI). In order to safeguard the interests of small and medium...

...taken as required. Finally, it is important to promote products aggressively and to participate in Indian trade exhibitions whenever possible.

India has been reducing import **duties** across the board since 1991 to align Indian industry with global markets. Until 1996, newsprint carried a zero rate of import **duty**, and even today it attracts an import **duty** of just 5 percent.

The import of newsprint was placed on Open General License in May 1995. This means that at that time, all types...

...newsprint for every one ton of imported product.

Until 1996, the domestic newsprint industry was partially insulated from international price fluctuations due to high import **duties** and a depreciating Rupee. Once import **duties** were completely removed from newsprint, the Indian newsprint industry came under pressure from imports. Against a background of falling international prices of newsprint and repeated appeals from local manufacturers, the government imposed a 10 percent customs **duty** on imported newsprint beginning October 26, 1996. The following month, the government issued a notification stating that this **duty** would be applicable only to newsprint containing less

than 8 percent ash content; and that newsprint with more than 8 percent ash content would be allowed to be imported free of **duty**. In the absence of testing facilities at the ports to check ash content, this exemption provided room for mis-declaration to save import **duty**. The measures themselves led to large-scale dumping of newsprint by international suppliers, and resulted in a major portion of demand being met through imports.

In a bid to avoid customs **duties**, Indian importers, even traders, began bringing in large quantities of newsprint to substitute for writing and printing paper. Following this, the government imposed an end-user **condition** on **imported** newsprint, and newsprint was removed from the list of OGL items. This meant that newsprint could only be imported for use by registered ...compared with 1996.

To obtain relief from imports, domestic newsprint manufacturers approached the Designated Authority in the Ministry of Commerce for imposition of anti-dumping **duty** on import of newsprint from the U.S., Canada and Russia. After 8 months of investigation, in May 1997 the Designated Authority recommended imposition of anti-dumping **duty** equivalent to the dumping margin. This recommendation was rejected in May 1999.

Following the Government of India's (GOI) 1998 budget, the landed cost of...

...spare parts, chemicals and waste paper began to cost more. It is an anomaly that inputs and raw materials attract nearly three times more customs **duty** than the finished goods.

There is also an apparent anomaly in the definition and specification for manufacture of newsprint, drawn by the Bureau of Indian...

...grounds that these papers do not conform to BIS standards. While the BIS standard is being revised, this indigenous newsprint is not exempt from excise **duty**.

The Ministry of Information and Broadcasting issues policy guidelines that govern the import of newsprint. The RNI authenticates the certificate of registration for import of newsprint on submission of a formal application and other documents.

The Indian customs **tariff** defines newsprint as uncoated paper of a kind used for the printing of newspapers, of which not less than 65 percent by weight of the...

...microns, weighing not less than 40 g/m² and not more than 65 g/m².

Standard newsprint grades in India are 49 GSM. Under existing law, foreign merchandise bearing any name, trademark or description must be marked with the country of origin, either on the goods themselves or on their containers...

...customs must show country of origin, description, quantity and value of goods.

In the case of domestic manufacture and for the purposes of local excise **tax**, newsprint is defined as paper of a kind intended for the printing of newspapers; and is manufactured by a manufacturer of newsprint

specified under Schedule 1 of the Newsprint Control Order, 1962 and supplied against a **purchase order** placed upon such a manufacturer by a newspaper which is registered by the Registrar of Newspapers under the provisions of the Press and Registration of...

...a large number of mills that are not financially viable and are currently closed; or the expansion of existing mills.

The following rates of customs **duty** apply to standard newsprint (HS code 48.01) :

Basic Special Total
5 0.5 5.5

The GOI's 1998 budget reduced the customs **duty** on newsprint imports from 10 to 5 percent; and exempted newsprint from the special additional **duty**, which is levied to offset the local **taxes** on domestic manufacture.

The customs **duty** on newsprint imports was raised marginally in the GOI's 1999-2000 Budget. These imports attract a surcharge of 10 percent on basic **duty**, which amounts to 0.5 percent. The basic **duty** on newsprint was reduced from 10 to 5 percent in the 1998-99 GOI budget, while the **duty** on high ash content newsprint (glazed newsprint) was raised from 0 to 5 percent.

There is no specific definition of glazed newsprint. Without clear-cut

...

...as newsprint, but instead handle a wide range of products.

Distribution is performed by paper wholesalers, retailers and also by the large publishing houses. Certain **tax** benefits are reserved for newsprint importers. Under current **laws**, middlemen or agents import newsprint on behalf of authentic users and also stock and sell. Industry

experts want the importing by agents to continue, but...Bank guarantees have often been used by American banks, and project financing is available from the World Bank, the Asian Development Bank, and bilateral donors including - under special **conditions** - Japan's Overseas Economic Cooperation Fund (OECF).

Key Contacts

Importers, Paper Merchants, Distributors and Indenting Agents
Universal Pulp & Paper 416 Pocket A2 Sector 8, Rohini...S. firms in the newsprint industry in the region at this time. original works prepared by U.S. government employees as part of their official **duties**. All rights reserved.

01555777 Supplier Number: 24262113 (USE FORMAT 7 OR 9 FOR FULLTEXT)
Sterling Forges Ahead With EDI

May 18, 1998

Word Count: 798 (USE FORMAT 7 OR 9 FOR FULLTEXT)

ABSTRACT:

Sterling Commerce Inc is moving ahead with extensions of its servers that enable companies to exchange EDI **purchase orders** and invoices across corporate intranets. That means product **catalogs**, call-center applications and directories can fit in an EDI business-trading environment. Yet Sterling and others still face an uphill climb. Questions about whether...

TEXT:

...a year makes a big difference. Fourteen months ago the EDI software developer was producing some of the first servers enabling companies to exchange EDI **purchase orders** and invoices across corporate intranets. Now it is forging ahead with extensions that join PC applications with Internet EDI.

That means product **catalogs**, call-center applications and directories can fit in an EDI business-trading environment. Yet Sterling and others still face an uphill climb.

...omitted

"We're moving data of any kind between parties in a completely automated fashion, whether they're spreadsheets, price lists, bar-code information or **catalogs**," said Roxanne Stanfield, Internet product manager for Sterling's Gentran product line. "Ultimately, WebSuite gives corporations the tools for centralized IT management."

Analysts said Sterling...
...Sterling's WebSuite, Stanfield said.

For some companies, the new Internet EDI tools are spurring wholesale changes in business processes. For 10 years, Vipar Heavy **Duty** Inc. has helped facilitate paper-based trading among its 75 independent truck distributor customers--a collective that accounts for \$1 billion in annual trades. It...

...50,000, lets developers create applications using any ActiveX development tool. As such, it is limited in support of JavaScript.

EDI vendors still face long-term challenges, including pressure on their proprietary value-added networks and Extensible Markup Language commerce products that are expected to come out in the next several months, analysts...

12/6/K/14 (Item 2 from file: 9)
DIALOG(R)File 9: Business & Industry(R)
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01023834 Supplier Number: 23602244 (USE FORMAT 7 OR 9 FOR FULLTEXT)
Making the back-of-the-house state of the art

August 05, 1996

Word Count: 2164 (USE FORMAT 7 OR 9 FOR FULLTEXT)

ABSTRACT:

...fraction of the time typical at several sit-down restaurants. This calls for a well-organized back-of-the-house operation. Several of the exact **duties** in an Applebee's kitchen, including portioning and multistation preparations, are taken care of prior to the arrival of the first customer. For entrees, the...

TEXT:

...the most important tools in the kitchen. All foodstuffs are date stamped when they come in and whenever they are processed.

One of the key **duties** of the kitchen manager is to conduct the "line check" before each meal period. If the KM is not available, someone of equal or higher...

...and in good condition. The form lists the ingredient name, descriptions of how the product should appear, feel or smell if it is in optimum **condition** and it **includes** a reminder of the item's prescribed shelf life.

A recent line check included entries for approximately 120 items.

"Every shift has a back-of...

...fairly loose dress code for workers in the back-of-the-house.

"All that's required is an Applebee's hat and shirt from the **catalog**. There is a variety of approved shirts they can wear, but typically they will choose T's or polos," a spokesman for the chain says...

...from a single manufacturer. Weber's crew realized savings by recognizing the potential for lower freight charges and greater volume discounts if the distributor combined **purchase orders** from three warehouses that previously ordered the products independently.

In a move to stabilize produce prices, Applebee's International last year began contracting with growers...

...s food purchases were about \$400 million in fiscal 1995, chain officials say.

The Applebee's purchasing department, in the course of carrying out its **duties**, deals with more than 1,000 vendors whose products are routed through 28 domestic distribution centers and four foreign centers.

In the end, Lumpkin says...

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12/6/K/15 (Item 1 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

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02556276 254348901

****USE FORMAT 7 OR 9 FOR FULL TEXT****

Fraud auditing

1998 Length: 68 Pages

Word Count: 49489

Text:

...Auditors (IIA), the Association of Certified Fraud Examiners (ACFE), and other regulatory agencies have taken bold steps in condemning fraudulent and unlawful acts in their **regulations**, codes of conduct, and auditing standards. Several frauds reported in the last few decades have led the government and the auditing profession to rethink and...also reported that two of the Big Six firms face over US\$13 billion in damages from related lawsuits.

* Schmedel and Berton (1992) reported a **tax** scandal in the Wall Street Journal concerning the Resolution Trust Corporation, a federal thrift cleanup agency which filed a US\$400 million civil suit against...

...Co. claiming that the accounting firm was negligent in auditing the collapsed Benjamin Franklin Savings Association. Andersen Consulting had failed to withhold Colorado's income **tax** from the pay of 35 nonresident employees. As part of the civil settlement, Andersen paid Colorado nearly US\$1 million in **taxes**, penalties, and investigation costs.

* Based on information from the US Chamber of Commerce, Davia et al. (1992) estimated that the cost of fraud in the...

...entitled The Liability Crisis in the United States: Impact on the Accounting Profession. The statement requests a substantive reform of both federal and state liability **laws**, specifically the replacement of joint and several liability with a proportionate liability It states:

While other serious problems must also be addressed, the principal cause...
...s responsibility for disclosing irregularities and illegal acts.

The survey demonstrates an "expectation gap" between auditors and other segments of the financial community about the **duty** to discover deliberate material defalcations of the financial statements. It also shows an "expectation gap" between auditors and bankers and financial analysts with respect to...and some 47 percent expect auditors to provide absolute assurance that financial statements contain no material misstatement due to errors.

Part I: Fraud and the **law**

In the last few decades, a plethora of fraud suits have been filed under the Securities Acts, the Racketeer Influence and Corrupt Organizations Act (RICO), and Common **Law**, some of which will be examined below.

The role of the securities and exchange commission

Auditors must recognize their responsibility to the public investors by...

...its inception and has questioned the role of the auditing and accounting profession when faced with materially misstated financial statements in violation of the securities **laws**. The SEC has not hesitated to

prosecute corporations and auditors in several cases of fraudulent financial statements. The SEC's proceedings are based on the following 1933 and 1934 securities **laws**.

Section 11(a) of the Securities Act of 1933 states that both the company filing the registration and its auditors may be held liable to....

...Clause (b) does not specifically state that the untrue statement or omission of fact had to be made with the intention to defraud. No express **statute** of limitations applies to Rule 10b-5. Court cases in 1967 made it clear that privity was not required in 10b-5 cases (Wallace, 1995) ...can be instruments for inflicting pecuniary loss more potent than the chisel or the crowbar. Of course, Congress did not mean that any mistake of law or misstatement of fact should subject an attorney or an accountant to criminal liability simply because more skilled practitioners would not have made them. But...

...629,000. The suit was filed under Section 182 of the 1934 Securities Act and Rule 10b-5. The court noted:

The auditor has a **duty** to anyone still relying on his report to disclose subsequently discovered errors in the report. This **duty** exists regardless of the auditor's lack of financial interest in any transactions to which the information relates. The obligation arises because of the auditor...

...668 (1976), marked the end of the accountant's liability for ordinary negligence under Section 10 of the 1934 Act. The Court stated:

When a **statute** speaks so specifically in terms of manipulation and deception, and of implementing devices and contrivances -- the commonly understood terminology of intentional wrongdoing -- and when its history reflects no more expansive intent, we are quite unwilling to extend the scope of the **statute** to negligent conduct.

Based on the above court ruling, an auditor is no longer liable to third parties under Section 10(b) and Rule 10b...*Inc. v. Seidman & Seidman*, 686 F 2d 449 (7th Cir. 1982), the defendants were charged with violating SEC Rule 10b-5 and several federal securities **laws**. The case dealt with the auditors' failure to detect US\$25 million inventory fraud perpetrated by top management. In this particular case, the judge made...

...an engine of theft against outsiders."

In 1984, the Wall Street Journal reported that the SEC challenged InterFirst's claim of US\$54 million in **tax** benefits from a net

operating loss carry-forward. The SEC questioned the claim, which was supported by the InterFirst's outside auditor, Arthur Andersen. Wallace...

...accepting any new SEC engagement in the New York area for a 45-day period. The action was triggered by the finding of a SEC **law** judge that the firm engaged in "unethical and improper professional conduct" in two audits of US Surgical Corp, because it failed to:

* exercise due care...

...character or integrity; and

* is engaged in unethical or improper professional conduct, willfully aiding and abetting the violation of any provision of the federal securities **laws**.

Sommer (1975) refers to a SEC chairman's reasoning behind the issuance of injunctive proceedings against public accountants:

Put very simply, when the Commission discerns that the auditor has not been alert to his **duty**, that he has gone through an exercise by rote, or that has not been true to the **duty** of fair presentation, then in my estimation, the Commission should properly authorize an action to enjoin the accountant from a repetition of those faults.

In...enacted the Racketeer Influenced and Corrupt Organizations Act (RICO) as a weapon against mobsters and racketeers who were influencing legitimate business. The act defines the **term** "racketeering activities" to include crimes such as mail fraud and fraud of the sale of securities. The RICO Act provides treble damages in civil cases brought under the Act...

...evolved into something quite different from the original conceptions of its enactors, but concluded that "this defect - if defect it is - is inherent in the **statute** as written and its correction lies with Congress."

Back in 1986, Martha Brannigan and Richard Koenig reported in The Wall Street Journal that nine were...Laventhal & Horvath was the first big accounting firm to be found guilty of a RICO charge in a case involving the audit of a federal **tax**-shelter program. The accounting firm collapsed and its former partners agreed to pay US\$48 million to avoid personal bankruptcy.

In 1991, Berton and Truell...

...the DeLorean Motor Co. Mukasey retained portion of the suits alleging

negligence and fraud by the accounting firm as DeLorean's auditor (Berton, 1996).

Common law liability

Fraud stories seem almost like soap operas. The faces and sets change, and plots can take on surprising twists; but in both cases corruption and ruination unfortunately seem omnipresent (Graham, 1996).

Auditors are accountable not only under the 1933 Act and RICO **statute**, but also under **common law** for materially misstated financial statements. **Common law** is based on judicial precedents rather than legislative enactment. The judge has the legislative flexibility to consider social, economic, and political issues as well as **prior case law**. In fraud cases, auditors are accountable for breach of contract. Under the **Tort Law**, auditors are also accountable for ordinary negligence, gross negligence, and fraud.

Breach of contract

Auditors' liability in fraud cases arises from breach of contract when...

...negligent in not doing so. The court noted:

Regardless of whether the auditors received the invoices for purposes of audit or otherwise, they had a **duty** to detect defalcations and on the basis of the evidence gathered could have and should have noted these defalcations.

The message of this fraud case...

...Rule 301 that prohibits disclosure of confidential information (Boynton and Kell, 1996). The jury found Arthur Anderson liable for aiding and abetting violations of securities **laws** (Rule 10b-5) and **common law** fraud because of their failure to disclose their knowledge of King Resources's wrongdoing to Fund of Funds Limited. In addition, the jury found the...in the Matter of Interstate Hosiery Mills Inc. (4 SEC 706, at 713), the court felt that the auditor was negligent in carrying out his **duty**. A prudent practitioner must recognize unfamiliar situations and take such precautionary measures as warranted by the circumstances. In such instances, the auditor should adopt extra...

...intend to provide the information, and foreseen beneficiaries for whom they know the client will provide information. This also reflects the view of the American **Law** Institute, in its Restatement of Torts (1977, No. 552).

Court rulings on auditors' responsibility and liability on fraud cases is not consistently applied.

They may...issued the Sentencing Guidelines for Individuals in 1987. On May 1, 1991, the USSC submitted to Congress its Proposed Guidelines for Sentencing Corporations which became **law** on November 1, 1991. The Sentencing Commission added an eighth chapter "Sentencing of organizations" to the seven earlier chapters of the Federal Sentencing Guidelines. According...

...level person who has a prior criminal record.

The fine goes down if the organization has an effective program to prevent or detect violations of **law**. Organizations may help the judge reduce the culpability score if they can demonstrate that such activities are selfreporting to authorities, co-operating with authorities, accepting... foreign officials in order to close important deals (Evans et al., 1994).

The Internal Revenue Service (1976) found that bribes abroad may have led to **tax** fraud in accounting. A SEC-sponsored voluntary compliance program (1976) disclosed that over 250 US corporations had made questionable or illegal payments in the USA...

...made illegal payment to Leila Takla, a member of the Egyptian Parliament. On January 27,1995, Lockheed pleaded guilty for conspiring to violate US antibribery **laws** and was fined US\$24.8 million. It admitted to falsifying records and lying to the Pentagon in selling three C-130 cargo planes for US\$79 million to Egypt (Pasztor, 1995).

In Canada, state **law** bans bribery of federal and provincial government officials but does not address such payment to foreign government employees. The US Foreign Corrupt Practices Act and the UN Draft International Agreement on Illicit Payments could provide Canada with a framework for drafting **laws** prohibiting bribes of foreign officials (Klotz, 1994).

In May 1994, the OECD, whose membership consists ...Standard Board issued SAS No. 54 (Section 317), Illegal Acts by Clients, which superseded SAS No. 17. The statement defines illegal acts as violation of **laws** or governmental **regulations** and provides guidance in three general areas:

1 an auditor's responsibility for detecting and disclosing illegal acts;

2 the audit procedures an auditor should...

...for the withdrawal; and

* prepare a letter stating the agreement or disagreement with the company's statements.

In 1995, the US Congress passed the securities **law** titled The Private Securities Litigation Reform Act which demands that auditors first hunt for illegal acts. Previously, auditors were required to look for illegal acts only if their suspicions were aroused. The new **law** says an auditor must first hunt for illegal activities, then check for misleading numbers or omissions in a company's financial statements (MacDonald, 1996). The act imposes, for the first time, a **duty** on an independent auditor of a public company to report fraud or illegal activity to the SEC. Under the act, an auditor's responsibility covers any activity in violation of **law**, such as EPA, FOA, and EEOC violations (Rossow, 1996).

Under SAS No. 54, an auditor's responsibility to detect and report misstatements resulting from illegal...

...to SAS No. 53 which requires external auditors to report errors and irregularities. Examples of illegal acts having a direct material effect include violations of **tax laws** or of government grant contracts. Examples of illegal acts having a material but indirect effect on financial statements include violations of equal employment and antitrust **laws** (Ricchiute, 1996).

The AICPA has recognized the establishment of an adequate internal control structure as a preventive measure of potential irregularities. In April 1988, the...investigate, and deter fraud. CFEs often have accounting or auditing backgrounds and work in such fields as forensic accounting, fraud auditing and investigations, loss prevention, **law** enforcement, research and academics, and public accounting. CFEs can cash in on white collar crime by offering expert assistance to attorneys and litigators (Cohenson and...risks:

* Internal environmental risk which consists of conditions, circumstances, and influences on a company that are subject to management control; and

* External environmental risk which **includes** industry **conditions**, regulatory and legal considerations, and the business environment.

The Treadway Report found that frauds were often initiated during good

times, as growth got out of...red flags) that have proven to be associates with management fraud. The following conditions are considered indicators of possible management fraud:

- * managers repeatedly assuming subordinates' **duties**;
- * managers dealing in matters outside their profit center's scope;
- * managers not complying with corporate directives and procedures;
- * generous performance-based reward systems;
- * a domineering...

...made an analysis of 114 actual cases of corporate fraud published in the Internal Auditor between 1986 and November 1990. They found limited separation of **duties**, false documentation, and inadequate or nonexistent control account for 60 percent of the cases. Moreover, the study found that professional and managerial employees were involved...and types of potential material irregularities.

* Exercising due care in pursuing indications of irregularities and illegal acts. Under required circumstances, reporting indications of irregularities to **law** enforcement or regulatory agencies.

The GAO Field Work for Financial Audits require government auditors to:

* Provide reasonable assurance of detecting irregularities material to the financial...things during an audit that might warn of fraud or misstatements, including:

- * the way the client's financial staff responds to questions;
- * improper segregation of **duties**;
- * poor recordkeeping;
- * a lot of cash activity; and

* the lack of a bidding process for the purchase of goods and services.

Ziegenfuss (1996) performed a...

...management's responsibility of the institution's annual report for:

* establishing and maintaining adequate internal controls over financial statement reporting and for complying with applicable **laws** and **regulations**; and

- * management's assessment of the effectiveness of the internal control and

the compliance with designated **laws** and **regulations** (FDICIA, 1991).

According to FDIC chairman L. William Seidman, who testified before a House Energy and Commerce subcommittee, banks' independent auditors should share with regulators...risk of loss to a financial institution because of the speed with which losses can occur. As a preventive measure, he recommends proper separation of **duties** to ensure that no single individual has the ability to initiate, verify, and transmit outgoing wire, or redirect incoming wires to accounts other than those...
...development concern Dr Jungen Schneider, and international sports flooring company Balsam. Balsam's four-man management board was arrested on suspicion of committing fraud, evading **taxes**, and falsifying data to obtain loans. Balsam owed 50 German and foreign banks roughly US\$900 million. German banks defend their credit policies by saying...care abuses.
In the USA, health care fraud is of such magnitude that it has attracted the attention of the US Congress and local governments. **Laws** have been enacted to curb health care fraud. Some fraudulent health care cases are discussed below.

Blue Cross and Blue Shield of Missouri (1992) had...

...The lab billed the doctors for the lower rate while charging the government insurer the full amount.

On August 21, 1996, President Clinton signed into **law** the Health Assurance Portability and Accountability Act, commonly known as the Kassenbaum- ...which do not go to patients (Duggan, 1995).

The Insurance sector

An accountant is not a guarantor of the reports he prepares and is only **duty** bound to act honestly in good faith and with reasonable care in the discharge of his professional obligations (SEC v. National Life Insurance Co., 1974...).

...filed by the Florida Insurance Commission accused Merrill Lynch of fraud and also accused Coopers & Lybrand, Guarantee's auditors, of malpractice and breach of fiduciary **duties**.

Omaha Indemnity Company is still recovering from US\$500 million in reinsurance fraud losses inflicted by two of its managing general agents (MGAs) in a...and budget for fraud detection and financial auditing in 1992. He improved his department's link with federal investigators and encouraged state legislators to pass **laws** making it easier to detect and prosecute insider fraud.

The results are impressive: 32 insurance executives in Louisiana were convicted of various white-collar crimes...

...designed to mislead regulators and investors about the financial condition of Guarantee and its parent, Transmark USA.

In 1995, Montana Governor Mark Racicot signed into **law** State Bill 253, the Insurance Fraud Protection Act. The **law** makes insurance fraud a felony. Companies accepting premiums without providing coverage and consumers supplying false oral or written information could be charged with fraud. The...

...about the partnership's prospects and risks.

The 1996 survey by the Insurance Research Council (IRC) found stronger support for actions of insurance companies and **law** enforcement to vigorously investigate and punish insurance criminals, particularly corrupt professionals, including doctors and lawyers involved in fraud rings. In 1995, between US\$5.2...

...future adjustments CGLIC will make to a group of policies which were impacted by adjustments the company made to recover the cost of the DAC Tax and the provisions of the Omnibus Budget Reconciliation Act of 1990 (Life Insurance Industry, 1997).

Insurance fraud is also increasing in the international area as... corporations (Shapiro, 1994).

On March 4, 1995, The Economist reported the securities fraud in the Singapore's stock exchange. The Singapore International Monetary Exchange (SIMEX) **regulations** have been seriously tightened in the wake of the Singapore-staged collapse of Barings. The Finance Minister Richard Hu recommended greater separation of trading and...

...define the term "reasonable assurance" (Cockburn, 1993). In the Canadian case of International Laboratories Ltd v. Dewater (Manitoba), 54 ALR 2d, published in the American **Law** Report, the court found the auditors negligent for failing to exercise his intuitive feelings and professional skepticism:

In holding the defendants liable for their negligence...on the results thereof, recognizing that fraud or error may materially affect the financial statements (SAS 110, 1995). The second statement, SAS 120, "Consideration of **law** and **regulations**" establishes standards and provides guidance in the auditors' responsibility to consider **law** and **regulations** in an audit of financial statements. Both statements require auditors to design audit procedures so as to have a reasonable expectation of detecting misstatements arising officials, counterfeiting public debt, **tax** evasions, planned losses, writedown of the nominal value of shares, bribes-for-contracts, conflict-of-interest

and others have been reported by the Italian press...

...lire (US\$350 million) since the shareholders of FerFin had approved a radical writedown of the nominal value of its shares.

In 1994, Salvatore Sciascia, **tax** director of the Fininvest, a company owned by the Italian prime minister Silvio Berlusconi, turned himself in to investigators and admitted to have authorized bribes to government **tax** authorities. Sciascia's confession unleashed new conflict-of-interest charges against the prime minister (Bannon, 1994).

In 1995, prosecutors charged Cesare Romiti, an executive of...

...the executives may have acted on an inside information to cash in their Olivetti stock. The Consob is recommending a revision of the current securities **laws** to prevent a similar scandal.

The Swiss perspective

In the competitive global business environment, executives and auditors do not have the luxury of identifying fraud...

...to the region's political history (Kovacs, 1996b).

In Hungary, there is a continuous battle between the internal auditors, who, according to the Hungarian Banking **Law**, are responsible to report suspected fraud to the police, and the financial managers who want to keep those stable clients, who are often engaged in...made at or near the end of accounting periods and others.

2 Internal control symptoms which include a poor control environment, lack of segregation of **duties**, lack of physical safeguards, lack of independent checks, lack of proper authorizations, lack of proper documents and records, the overriding of existing controls, and an...activity.

* The possibility of detection (or deterrence) of a fraud involving bogus placement agencies is to verify new vendor firms listed in a professional association **catalog** and/or verify the vendor name and address through the telephone book.

* The means of detecting alteration of receipts for employee expenses is done by...US\$130,000 was missing. Further investigation determined that the supervisor had misappropriated the missing funds. The auditor recommended segregation of the manual checks issuance **duties**, enhanced procedures for documenting customers' emergency requests for funds, and

tighter controls over storing and accounting for check stock.

Inquiry

It helps to know that...

...action. When asked if the people who were providing services for the project were relatives, the supervisor answered: "They are not relatives, they are in-laws." The supervisor was replaced and the boss was reprimanded.

I Part IX: The white-collar crime

White-collar crime

All types of frauds are characterized...A similar definition is given by the US Department of Justice (1977):

* Intent to commit a wrongful act or to achieve a purpose inconsistent with law or public policy

* Disguise of purpose through falsities and misrepresentations employed to accomplish the scheme.

* Reliance by the offender on the ignorance or carelessness of...

...to help businessmen detect and deduce occurrences of fraud within their organizations.

* White Collar Crime discusses the seriousness of white-collar crimes and how the law and judges impact the defense strategies for the companies.

* IRS Investigator's Handbook describes how IRS investigators trace financial transactions as they relate to white...

...new No. 30116 to Title 5, Guam Code Annotated, relative to establishing a White Collar Crimes Unit within the Prosecution Division of the Department of Law. The Attorney General may utilize the services of specified personnel in any Executive Branch department or agency for White Collar Crime prosecution purposes (Charfauros, 1995...

...argue that the war on crime in Canada largely ignores not only such white-collar employee crime, but also violations committed by corporations.

These include tax evasion, bribery, fraudulent advertising, illegal mergers, and monopoly pricing. Canadians pay increased taxes and prices for consumer goods amounting to as much as US\$20 billion a year as a

result of white-collar crime. US statistics show...Tendency to manage by crisis: a disregard for structure, controls, or procedures.

- * A desire to control operations and safeguard assets: a disregard for segregation of **duties**.
- * Continued adversarial relationships with groups within and outside the organization - particularly auditors.
- * Chronic job frustration: a known malcontent.

According to Bliss et al. (1997), nearly...

...branch's record disclosed that almost half million dollars was missing.

The teller processed entries, performed reconciliations, and handled disbursements. There was no separation of **duties**, and the teller was trusted by the branch manager.

The Institute of Internal Auditors' Professional Standards Bulletin (PBS 84-3) warn that audit tests are...

...and conceal the theft. Bologna (1994) cites the following environmental factors that enhance the probability of embezzlement:

- * Inadequate rewards.
- * Inadequate internal controls.
- * No separation of **duties** or audit trails.
- * Ambiguity in job roles, **duties**, responsibilities, and areas of accountability
- * Failure to counsel and take administrative action when performance levels or personal behavior fall below acceptable levels. Inadequate operational review
- * Lack of timely or periodic review, inspections, and follow-up to assure compliance with company goals, priorities, policies, procedures, and governmental **regulations**.
- * Failure to monitor and enforce policies on honesty and loyalty

Embezzlers are persons who hold fiduciary positions. Bologna cites the following schemes to embezzle cash...the balances disagreed, the beginning balance was less than the previous day's ending balance. These differences always occurred when a particular nurse was on **duty**. Further study

determined that the nurse had a personal substance abuse and was pilfering the narcotics.

The IIA Mount Diablo Chapter (1993) reported a case...vendor fraud, auditors look for red flags or weaknesses in the internal control system such as:

- * vendor not on the approved vendor list;
- * invoice without **purchase order** or receiving document;
- * payment without invoice;
- * vendor's address, telephone number, and ZIP code matches employee's address;
- * sequentially numbered invoices;
- * others (Kramer, 1996).

Cash...

...s attention the commingling of personal and company funds, the company established a centrally controlled bank account and night deposit procedures.

Lack of separation of **duties** for cash receipts and cash application may cause fraudulent misappropriation of cash. The IIA North Jersey Chapter (1995) reported that the internal auditor's review...

...bank deposits disclosed another US\$50,000 in revenue losses where profits should have been realized. Afterwards, internal controls were implemented to ensure separation of **duties** for cash receipts, cash application, and cash report functions to help prevent such losses in the future.

The IIA Houston Chapter (1997) reported that a...Florida West Coast Chapter (1990) reported that a company payroll clerk, who manually prepared paychecks, figured nobody checked to see that the amount withheld for **taxes** was accurate to the penny To make the payroll worksheet balance, the clerk's withholding was increased by the pennies. Nobody complained. The clerk's good luck soured after the pennies became quarters and the IRS investigated the clerk's filing for several thousand dollar federal **tax** refund for possible **tax** fraud.

The IIA Calgary Chapter (1991) reported that an auditor performed a thorough compliance test of the payroll system and found little evidence of control...

...guilty of misusing £ 122 million in shares belonging to Maxwell Company pension fund (Chernoff, 1996). The UK Goode Committee's report on proposed pension law reforms would increase the accountant's role, both as an auditor and adviser to pension plans. The report calls for auditors to be statutorily required...some means of permanently eliminated receivables from accounts through unauthorized adjustment. Manipulation of transactions that are most common include: adding unauthorized transactions (e.g. phony **purchase orders**); altering transactions (e.g. posting deposits to another accounting); and not processing transactions (e.g. interest income). Industry groups, which are expected to have large... tampering is considered to be the most prevalent computer fraud. Input scams can be prevented with an effective internal control system such as:

- * separation of **duties**;
- * control totals;
- * access controls; and
- * audit trails (Thornhill, 1996).

Computer fraud, which is considered a criminal offense, has drawn the attention of federal and state...

...The Counterfeit Access Device and Computer Fraud and Abuse Act of 1984 (Title 18, USC Section 1030).

- * Computer Fraud and Abuse Act of 1986 (Public **Law** 99-474).
- * Electronic Communications Privacy Act of 1986 (Public **Law** 99-508).
- * Small Business Computer Crime Prevention Act of 1984 (Public **Law** 98-362). Computer Security Act (Public **Law** 100325).

In 1996, the US-based Computer Security Institute (CSI) queried security practitioners from a variety of US agencies, financial institutions, and universities. The CSI...

...than 70 percent do not have a "warning" banner stating that computing activities may be monitored;

- * less than 17 percent said that they would advise **law** enforcement if they thought they had been victimized;
- * about 70 percent cited fear of negative publicity as the reason they would not report a suspected...

...Rapalus (1996) feels that there has to be a greater commitment of

resources to information systems security and increased cooperation between the private sector and **law** enforcement. The information age has already arrived, "but many organizations are woefully unprepared."

Credit card fraud in the US involving bank cards alone totaled US...31, Section 3729-3732, allows individuals to file what is called a "qui tam"

lawsuit (Latin for "in the name of the King"). Under the **law**, a whistleblower can bring suit in the government's name against a company perpetrating fraud against the government. The False Claims Act permits recovery of...test from a computer file and slipped that information to a federal prosecutor or a congressional committee chairman, that employee could be prosecuted under federal **law**.

In 1991, a former Rockwell machinist David Vosoughka filed a suit under the Federal False Claims Act, which awards whistle blowers a portion - generally 15...and establish the SEC early in the 1930s. The SEC has pursued unrelentingly its task by investigating and prosecuting corporations which have violated the securities **laws**. The cases presented show that the SEC has been quite successful in curving down the issuance of fraudulent financial statements in the USA. The SEC...
...1995).

Lacativo (1995) suggests a risk-based approach to auditing fraud to respond to the companies' expectation that auditors help them meet the strict federal **regulations** against fraud. A review of the current literature also suggests that companies are relying heavily on auditors to minimize losses from fraud. Zeune (1994), in...Accountancy (1995), "Statement of auditing standard 110, fraud and error", Vol. 115, March, p. 125.

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****USE FORMAT 7 OR 9 FOR FULL TEXT****

Identifying effectiveness criteria for Internet payment systems

1998

Word Count: 9810

Text:

...difficult place to do serious business (see, for example, Poon and Swatman 1995, 1996, 1997). Most companies limit their business activities to creating on-line **catalogues**, advertising products and communicating with customers through e-mail, although it is not difficult to imagine the potential of the Internet as a true market...once this link is complete, consumers can purchase any goods and services using their wallet ID;

- when wallet ID is transmitted as part of the **purchase order**

to the merchant, the merchant adds additional transaction information to the received **purchase order** and sends this to CyberCash;

- CyberCash reformats this message and sends it to the bank for approval;

- when the payment is approved by the bank...exchange of business documents between organisations in standardised format (Swatman, 1993). Businesses and their vendors use EDI to exchange many business-related documents such as **purchase orders**, invoices, shipping notices, and payments to cut costs and run the business more efficiently. Financial EDI involves the electronic exchange of financial documents such as...indicators/success factors do you believe need to be addressed in terms of each of the parties you have identified in question one above? Please **include** the definition or **term** you are using for each indicator. Note that some factors are applicable to more than one party.

The final version of this questionnaire, which includes...

...use ten different IPS to obtain different types of goods and service over the Internet.

- Regulators. This group includes national regulators (such as government bodies, **law** enforcement agencies, the legal profession and banking regulators). Regulators have a variety of reasons for being interested in IPS development, including the impact of the IPS concept on the money supply, ways of tracking **tax** payments in cyberspace and the need to protect consumer rights and the public interest. At this stage of IPS development, their dilemma is how to encourage the development of efficient IPS while also being able to protect the public interest. For instance, **law** enforcement wants to be able to trace back payment transactions to track illegal activities, but this requires consumers to sacrifice some of their entitlement to...

...indicators/success factors do you believe need to be addressed in terms of each of the parties you have identified in question 1 above? Please **include** the definition or **term** you are using for each factor and note that some factors are ...Internet payment systems, but also to their political aspects (and include the following concerns:

- It is very difficult to produce universal IPS, because of differing **tax** and legal **regulations**. The Internet links the entire world and it is not owned by any single organisation or country. Should a legal dispute arise, it could be...

...the consumer? Government agencies are responsible for managing the movement of money flow. They need to collect information about transactions in terms of managing customs **duties** and **taxes**.

- Anonymous ...indicators/success factors do you believe need to be addressed in terms of each of the parties you have identified in question one above? Please **include** the definition or **term** you are using for each factor and note that some factors are applicable to more than one party. To assist you in the task, I...

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01986407 43693453

****USE FORMAT 7 OR 9 FOR FULL TEXT****

1998-1999 Annual report: The Ohio Society of CPAs

Jul-Sep 1999 **Length:** 18 Pages

Word Count: 4067

Text:

...conference. Participants developed implementation strategies in seven key areas:

Enabling members to deliver
Driving markets to members

Mobilizing the membership

Representing members

Establishing rules and **regulations**

Protecting the public interest

Being more competitive in the marketplace

At the conclusion of the program each state committed to work on teams to implement...

...to provide exposure to students and faculty members on the curriculum changes that will be necessary to prepare CPAs for the future.

GOVERNOR SIGNS UAA LAW:

Changes Include Non-CPA Ownership

On December 30, 1998, Governor Voinovich signed Senate Bill 200 into law. This Ohio Societybacked legislation implements virtually all remaining provisions of the Uniform Accountancy Act. The bill became law on March 30,1999.

The law allows for equity ownership of CPA firms by non-CPA professionals who work full-time for the firm. The law spells out that majority ownership and control of the accounting firm must remain with licensed CPAs and the nonCPA owners must meet specific guidelines.

The law also includes provisions on substantial equivalency and the prelicensure experience requirement. Substantial equivalency permits licenseholders in states found to be substantially equivalent to Ohio licensure laws to practice in Ohio without being formally licensed in Ohio.

The pre-licensure experience requirement changes from two years to one year with the new law. Consistent with UAA guidelines, the change recognizes the impact of mono in-depth, extensive accounting programs being offend in Ohio colleges and universities today.

Ohio...

...SOCIETY WINS

Battle to Define "Financial Planner"

The Ohio Society's legislative team successfully fought against a provision in House Bill 695 that would have included the term "financial planner" in the definition of "investment advisor." If the legislation had been adopted as presented, CPAs who provide financial planning services would have been subject to the regulations imposed by HB 695 and essentially be licensed twice. The Ohio Society vigorously worked with members of the General Assembly to favorably amend the proposal ...on CPA.access.

CPA.access debuted a new look in June 1999.

In the spring, the Society added many significant features to the online

CFE Catalog. An enhanced search function allows members to pinpoint the exact course and location they're looking for. And soon, you'll be able to put all of your courses into one shopping cart. Register and pay once for all of your transactions on CPA.access.

Registrations Received Online

1997-98:141

1998-99: 589

318 % Increase
Ohio Accounting...

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01813978 04-64969

****USE FORMAT 7 OR 9 FOR FULL TEXT****

A few comments about the proposed revisions to UCC section 2-207: The battle of the forms taken to the limit of reason

Winter 1998 Length: 18 Pages

Word Count: 7499

Text:

...THE PROBLEM

According to Professor John Murray, "[w]hatever may be said of the lack of certainty, stability, and predictability in many areas of the law, chaos rarely is discovered."¹² Even a decade ago, however, many were describing the problems of innumerable buyers and sellers who tried to make contracts through...

...suggest the current Article Two redrafting exercise was required entirely because of the unhappy results of sec 2-207.10 While, for example, the sales law of the French Civil Code has been left virtually intact since it was promulgated in 1804, Article Two was less than forty years old when...

...worth her salt should ask is, "Is there a contract?"¹³ For several blissful centuries, the answer to that question under the Anglo-American common law was always found in the simple and straightforward "Mirror Image" rule. Li'l Mirror came up in a simpler time-a time when farmers met...

...This disturbing outcome became increasingly common as the business environment became ever more complex. Suppose, for instance, that a buyer,

after reviewing a seller's **catalog**, sends the seller a **purchase order**, complete with "boilerplate" terms and condition that would, if given effect, give the buyer every benefit and advantage for which she could ever hope. Since the seller's **catalog** is indefinite as to quantity, it would rarely be considered a valid offer to sell. Thus, in the vast majority of cases like this, the buyer's **purchase order** will be deemed an offer.

At any rate, our seller, upon receiving the **purchase order**, would check the price and delivery date, pack up the widgets, and ship them to the buyer. Along with the widgets, the seller would include...

...end of it: The offer and acceptance are not mirror images, so there would be no contract. But there is another possibility under the common law. The seller's invoice could be construed as a rejection of the buyer's offer, and as a counteroffer. Under this scenario, The buyer's... understood."²¹ Practically speaking, sec 2-207 addressed the so-called 'battle of the forms' illustrated above-the situation where a buyer's standard form **purchase order** expressly or impliedly claims favorable warranty and remedial protections, the seller's standard acknowledgment just as zealously disclaims any such protections, but where the "dickered..."

...enough alone, was not good enough. Not content to permit businesspeople and their lawyers to figure out how to accommodate the realities of the common law doctrines, Llewellyn wished to firmly fix in concrete his beliefs about what these parties really meant by way of a contract-even if the unconscious...
...the 'expressly conditional' formula language in the seller's form."³¹

The normal operation of such counter offers was a return to the old common law "last shot" result-that upon performing after receipt of such a formulaic "counter offer," the buyer would have impliedly manifested acceptance of the seller's...

...buyer would not have read the seller's response as a counter offer³⁶-an analysis that Professor Murray argues "ignored the fundamental principle of contract law that an ambiguous response to an offer need not be treated as a counter offer."³⁷

This "flawed judicial analysis found an offer, rejected by..."

...expect, sellers quickly caught onto the game. To some, the goal was to become the offeror-to assert that the response to the buyer's **purchase order** was really the offer-inviting the usual **purchase order** response from the unsuspecting buyer.⁴²

Llewellyn's goal was to expunge the fundamental flaws of unfair surprise and oppression caused by the "application of monistic principles of classical contract law" to the "battle of the forms"-to nip "incipient unconscionability in the bud."⁴³ But it hardly seems laudable to merely reverse the outcome-to...the parties that recognizes the existence of a contract but the records of the parties do not otherwise establish a contract for sale, the contract **includes**:

- (1) **terms** in the records of the parties to the extent that the records agree;
- (2) terms not in the records to which the parties have otherwise agreed;
- (3) **terms** supplied or **incorporated** under any provision of this [Act]; and
- (4) terms in a form record supplied by a party to which the other party has expressly agreed...

...a contract is formed by any manner permitted under this article and either party or both parties confirms the agreement by a record, the contract **includes**:

- (1) **terms** agreed to prior to the confirmation;
- (2) terms in a confirming record that do not materially vary the prior agreement and are not seasonably objected to;
- (3) terms in confirming records to the extent that they agree; and
- (4) **terms** supplied or **incorporated** under any provision of this [Act].⁵⁴

B. TEST DRIVING THE ALL NEW SECTION 2-207[55]

Professor Hyland offers a particularly lucid analysis of...

...still pretty basic nevertheless. In that first case, a Buyer and Seller exchange standard forms. Well, records to be politically correct. The first-Buyer's **purchase order**-requests a full warranty package. The second-Seller's invoice-disclaims all warranties.⁵⁷ Seller's invoice also excludes liability for consequential damages. In other...the parties that recognizes the existence of a contract but the records of the parties do not otherwise establish a contract for sale, the contract **includes terms** in a record supplied by a party to which the other party has expressly agreed.

Ah-ha! The key seems to be whether Buyer expressly...

...ought to think about how such a deal really would go down.⁷¹ As we have already posited, Buyer, having selected widgets from Seller's catalog, faxes Seller a **purchase order**. The **purchase order**, remember, requests a full warranty package and every imaginable remedy that ever sprang from a lawyer's fertile mind.

On the appointed day, a carton...

...about such triflings, initials the quantity on the invoice and puts it in her out basket destined for accounting.

After checking the invoice against the **purchase order**, Buyer's accounting clerk files the **purchase order** and the invoice together, and takes whatever measures are required to arrange for payment.

The sixty-four thousand dollar question is now, "Did, according to...

...to decide when a party has expressly agreed to a term in a form.⁷² But

then, this just seems weird. "Agreement" under the common **law** has always included, without preference, both express and implied agreements.⁷³

Really though, the distinction is often without importance.⁷⁴ Moreover, the Code still embraces...⁷⁵

Well then. Why didn't they just say so? If expressly adopted as the code's philosophy (say, as official commentary appended to state **laws** if and when the Draft is finally adopted), the question of whether someone—perhaps the receiving or accounting clerk—should have compared the fine print on Seller's invoice with the fine print on Buyer's **purchase order** becomes moot.

Perhaps the best suggestion comes from Professor Hyland. He reached his conclusion after realizing that for as long as he can remember, he...

...C.C. is the way Llewellyn chose to incorporate policy values. *Id.* It is common for legislatures to incorporate a general policy statement into a **statute**, which courts may or may not use when interpreting the **statute**. *Id.* Adopting the patent reason technique, however, Llewellyn allowed policy and purpose to inform the very language of the text. *Id.* As a result, policy use the policy statement as part of a canon of construction when construing a "conventional" **statute**. *Id.* Llewellyn's realist view was that, since courts always assert a certain degree of leeway in interpreting a **statute**, the best one could hope for was to provide some guidance in how best to exercise this leeway—to channel that impulse to produce uniformity...

...at 386 (citation omitted). Given the "web of interlocking textual concepts built into the code structure and form," courts should not automatically revert to common **law statute** interpretation methodology if the "text is not self-applying or does not yield a precise rule." *Id.* For the same reasons, courts should not resort...

...the section into a complete disaster." Letter from Professor Grant Gilmore to Professor Robert Summers, reprinted in RICHARD E. SPEIDEL ET AL., COMMERCIAL AND CONSUMER **LAW** 513-IS (5th ed. 1993). Gilmore also suggested that Llewellyn had nothing to do with the addition of subsection

(3). *Id.* John E. Murray, Jr...

...473 P.2d 18, 25 (1970); see also *Roto-Lith, Ltd. v. F.P. Bartlett & Co.*, 297 F.2d 497, 500 (1st Cir. 1962) ("The **statute** is not too happily drafted."); *Ebasco Servs., Inc. v. Pennsylvania Power & Light Co.*, 460 F. Supp. 183, 205 (E.D. Pa. 1978) ("[an] enigmatic section...

...3)"). *8. Id.* at 1310.

9. Letter from Professor Grant Gilmore to Professor Robert Summers, reprinted in RICHARD E. SPEIDEL ET AL., COMMERCIAL AND CONSUMER **LAW** 513-15 (5th ed. 1993). 10. See, e.g., Richard Hyland, Draft, 97 COLUM. L.

REV. 1343, 1350 (1997). II. *Id.* 12. *Id.*

Footnote:

13...

...1996). 15. *Id.* 16. *Id.*

17. *Id.* We should not lose sight of the fact, however, that while harsh results might be mitigated by the **Statute of Frauds**, the quasi-contract doctrine, etc., in normal day to day business not governed by the U.C.C., Mirror Image remains the rule of **law**. 18. *Id.* at 405

Footnote:

19. Hyland, *supra* note 10, at 1347. 20. *Id.*

Footnote:

21. Muny, Emerging, *supra* note 7, at 550. 22. *Id.*...In such case, the terms of the particular contract consist of those terms on which the writings of the parties agree, together with any supplementary **terms incorporated** under any other provisions of this Act.). 40. *Id.*

Footnote:

41. *Id.* at 553.

42. Id. at 554. Professor Murray observes that this "little trick...
...207(2) refers only to "additional" terms. Explanations span the range
from a printer's error to conscious decision. Id. Professor Richard Hyland
of Rutgers Law School notes, however, that courts may balk at a seller's manipulation of the law of offer and acceptance where it is done just to defeat buyers on warranty issues. Hyland, *supra* note 9, at 1350. 43. Id.

44. On...

...current formulation of 2-207 has simply become irrelevant. Thomas J. McCarthy, *An Introduction: The Commercial Irrelevancy of the "Battle of the Forms,"* 49 Bus. LAW. 1019, 1027 (1994). In this view, experienced lawyers draft their clients' forms to ensure that conflicting terms in the other parties' forms are canceled out...

...FORMS AND MATERIALS 36 (West Supp. 1997).

46. McCarthy, *supra* note 44, at 1019-20. 47. Id. at 1020.

48. Id. (internal citations omitted).

49. Law Student Matthew Francis, Paper Presentation at Regular Meeting of Sales & Leases Law Class, University of Montana School of Law (Apr. 29, 1998). 50. U.C.C. 2-207 'Alternative B' (1993 Draft) provided: Revised Section 2-207. Additional Terms in Acceptance or Confirmation. (a...

...to know of the varying terms from the circumstances and failed to object
to them. (c) If a contract is formed under subsection (a), the terms are: (1) those included under subsection (b); (2) those upon which the writings or records agree; (3) those to which the parties have otherwise agreed; and (4) any supplementary terms incorporated under any other provisions of this Act. (d) Between merchants, the burden of proof under this section is satisfied by a preponderance of the evidence...Art. 19, U.N. Conference on Contracts Are
the Official Sale of Goods (1980). In terms of ambitiousness, the UNCISG
keens much closer to the law of cow sales (i.e., the Mirror Image Rule) than it does to the U.C.C. As with the common law, Article 19 treats a reply with varying terms as a counter-offer. Henry D. Gabriel, Ending the "Battle of the Forms": A Symposium on the Revision of Section 2-207 of the Uniform Commercial Code, 49 BUS. LAW. 1053, 1058 (1994). This apparent "rigidity" is "eased" by the second subsection that softens this harsh result by limiting the effect of Article 19 to...

...Besides the traditional commercial evils that Karl Llewellyn wanted to

address, there are alternative values at work as well. For instance, the economic approach to law would focus reform efforts at "three basic tenets: respect for individual autonomy, reducing transaction costs, and providing legal stability." These tenets, proponents claim, would "provide
...

...A. White received his B.A. from the Montana State University and is a 1999 J.D. Candidate at The University of Montana School of Law where this article won the 1998 Commercial Law Foundation writing contest. The author wishes to express his utmost gratitude to Professor Scott Burnham of the University of Montana School of Law, whose patient and illuminating teaching methods continue to enrich Montana law students, and whose generous assistance made this article possible.

Descriptors:

...Commercial law

Classification Codes:

Dialog eLink: USPTO Full Text Retrieval Options

12/6/K/19 (Item 5 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

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01795366 04-46357

****USE FORMAT 7 OR 9 FOR FULL TEXT****

Organizing and managing channels of distribution

Spring 1999 Length: 15 Pages

Word Count: 11983

Text:

...channel relationship is facilitated, and what intrachannel conflict and channel member satisfaction are based on is impressive. Recent efforts to better understand how strong, long-term channel relationships develop-including the impact of trust, commitment, and relational norms on channel interaction-are noteworthy (cf. Anderson and Narus 1990; Anderson and Weitz 1992; Heide and John...options, and termination details vary considerably across different franchise contracts. Following the lead of Heide et al. (1998), research that provides guidance as to the terms that should be included in explicit contracts under

varying environmental and competitive conditions would be very useful.

The research on self-enforcing contracts has provided valuable insights.

However, numerous...multiple channels are complimentary to each other.

For example, Victoria Secret uses two primary channels to sell its lingerie and clothing, retail stores and mail **catalogs**. The mail **catalogs** are likely to increase traffic at the retail stores by providing greater exposure to, and identification with, the brand among shoppers.

Multiple channels may also...repair, and overhaul items, such as pipes and valves, bearings, electrical products and lamps, janitorial supplies, safety products, cutting tools and abrasives, and lubricants. Many **purchase orders** are involved, requiring considerable expense in people and systems. As a result, many manufacturers are demanding "one-stop shopping," at least in some sense. Distributors...

...A "lead" or "central" distributor is normally identified in each network. The manufacturer communicates its needs at a particular point in time through a single **purchase order** to this central distributor, who then coordinates activities with the other distributors in the network. A single delivery from the central distributor or individual deliveries from each distributor involved in the **purchase order** could be involved. Some of these integrated supply networks have thrived, while many others have failed.

How integrated supply networks can be better managed is...Science 13 (Winter): 83-99.

Reference:

, Jan Heide, and George John. 1995. "Understanding Dual Distribution: The Case of Reps and House Accounts." *Journal of Law, Economics, and Organization* 11 (April): 189-204. Jan Heide, and Mark Bergen. Forthcoming.

"Vertical Territorial Restrictions and Public Policy: Evidence From Industrial Markets." *Journal of Marketing...Journal of Marketing* 56 (April): 32-44.

, Shantanu Dutta, and Mark Bergen. 1998. "Exclusive Dealing and Business Efficiency: Evidence From Industry Practice." *Journal of Law and Economics* 41 (October): 99-119. Huber, George 1990. "A Theory of the Effects of Advanced Information Technologies on Organizational Design, Intelligence, and Decision Making." " Academy...

...of Marketing Research 21 (August): 278-289.

and Barton Weitz.1988. "Forward Integration Into Distribution: An Empirical Test of Transaction Cost Analysis." *Journal of Law, Economics, and Organization* 4 (Fall): 121-139. and .1989."Salesforce Compensation:An Empirical Investigation of Factors Related to the Use of Salary Versus Incentive Compensation." *Journal...*

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/6/K/20 (Item 6 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

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01736119 03-87109

****USE FORMAT 7 OR 9 FOR FULL TEXT****

Bank on it: Brother, do you owe me a dime? Part II

Nov 1998 **Length:** 5 Pages

Word Count: 2149

Text:

...applicants, have we got a program for you! Although you might have seen some of these in your local computer retail store or mail order catalog, many are available only through direct channels. I thought it useful to briefly discuss each and give you contact information so you can follow up...

...to business accounting or just want an easy-to-use program (that is deceptively powerful), then look no further. One-Write handles bank accounts, billing, **purchase orders**, estimates, payroll, job tracking and inventory, and business reports. It features an intuitive flowcharted graphical interface. There's even an interactive multimedia tutorial to get you started. Peachtree offers an optional subscription to its One-Write Plus **Tax** Service for acquiring annual updates on **tax** rates.

Peachtree Office Accounting

Peachtree Software Inc.

Microsoft Windows 95/98/NT

www.peachtree.com

800/228-0068

street price: \$149

For many PC and...
...in Peachtree Office Accounting. Collection notices can be produced in Word and e-mail reminders handled in Outlook. For payroll, Peachtree offers subscriptions to its **Tax** rate service.

M.Y.O.B. Accounting Plus 1.5

M.Y.O.B. Premier Accounting 7.5 (Multiuser Version

plus 6 months of updates...users available) Modules: \$1,300 to \$2,000 per module

Mas 90, a networked and modular program with 22 available modules (such as Accounts Receivable, **Purchase Order** Processing, and Inventory Management), gives you the flexibility of adding functionality as well as accounting system users as your business grows. The program is especially ...financial reports and graphs. All along the way you're assisted with numerous helpful samples and examples, audio help, and an online glossary of business **terms**. **Included** is a database containing hundreds of venture capitalists, banks, and investors so you have a direction once you've got the plan in hand.

Marketing...

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12/6/K/21 (Item 7 from file: 15)
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01721258 03-72248

****USE FORMAT 7 OR 9 FOR FULL TEXT****

Evaluated receipts settlement (ERS) and tax compliance

Sep/Oct 1998 **Length:** 8 Pages

Word Count: 4332

Evaluated receipts settlement (ERS) and tax compliance

Abstract:

The Task Force on EDI Audit and Legal Issues for **Tax** Administration was formed to coordinate efforts between the business community and

tax administrators in analyzing and addressing the issues posed for **tax** administration by electronic data interchange and related business processes. A report is the product of that effort. It describes the evaluated receipts settlement (ERS) process...

Text:

Headnote:

A Report of the Steering Committee Task Force on EDI Audit and Legal Issues
for **Tax** Administration

Headnote:

Foreword

Headnote:

The Task Force on EDI Audit and Legal Issues for **Tax** Administration (Task Force) was formed to coordinate efforts between the business community and **tax** administrators in analyzing and addressing the issues posed for **tax** administration by electronic data interchange and related business processes. The Task Force is composed of representatives of the Committee On State Taxation (COST), Institute for Professionals in Taxation (IPT), **Tax** Executives Institute (TEI)*, Multistate **Tax** Commission (MTC), and Federation of **Tax** Administrators (FTA), and commissioners from several state **tax** administration agencies. This report is the fourth in a series of reports to be published by the Task Force on issues relating to electronic commerce, emerging business processes and **tax** administration.

Through the Task Force process, the Electronic Business Processes work group was formed to examine the **tax** administration and compliance issues associated with certain emerging business processes, including the use of evaluated receipts settlement (ERS). A large group of taxpayer representatives and **tax** administrators gave freely of their time in an effort to understand the issues involved and to identify solutions which would meet the needs of both taxpayers and **tax** administration agencies.

This report is the product of that effort. It describes the ERS process and the benefits derived by its use. It identifies audit...

...Appendix E.

Stanley R. Arnold, Steering Committee Chair Commissioner, New Hampshire Dept. of Revenue Administration September 1998

Introduction

On October 7, 1994, the Federation of **Tax** Administrators (FTA) hosted a meeting to begin the process of forming a task force of state and private sector **tax** administrators to address Electronic Data Interchange (EDI).

On May 2, 1996, the steering committee of the task force met to discuss several additional issues related to electronic business processes utilized by taxpayers and **tax** authorities. Based on these discussions, the steering committee formed two new work groups to review issues and develop recommended procedures for taxpayers and **tax** authorities to follow. One of these groups, the Electronic Business Processes work group, is focusing on business issues such as corporate procurement cards, evaluated receipts...

...white papers that outline the issues and discuss possible options for taxpayers and taxing authorities to follow to ensure the necessary documentation is available for **tax** compliance and **tax** audits.

Evaluated Receipts Settlement (ERS), also referred to as Auto Pay, is a relatively new "business process" which is growing in popularity in the business...

...the use of ERS, and (4) potential alternatives to ERS use.

The ERS white paper represents the considerable work product of a large number of **tax** administrators and taxpayer representatives. Since ERS is a relatively new business process, this work group urges state **tax** administrators to educate their audit groups in this area. Traditionally, the obligation to calculate and remit sales **tax** is imposed on the supplier. Since the supplier no longer has complete control over the **tax** calculation function when using ERS, this becomes more complicated. However, it is important that the supplier realize that he still has primary **tax** responsibility and is not relieved of his obligations. The recently issued Auditing Electronic Data white paper by this task force provides general guidelines that are...

...notable variations from electronic data interchange (EDI) that could raise audit issues. Thus, education of the audit workforce is critical to an efficient and effective **tax** administration process.

Evaluated Receipts Settlement (ERS) What Is It?

ERS is a business process between trading partners that conduct commerce without invoices. In an ERS transaction, the supplier ships goods based upon an Advance Shipping Notice (ASN), and the purchaser, upon receipt, confirms the existence of a corresponding **purchase order** or contract, verifies the identity and quantity of the goods, and then pays

the supplier.

How Does It Work?

A supplier and its purchaser enter into an agreement to use evaluated receipts settlement. The supplier keeps the purchaser current with price/sales **catalogue** data from which the purchaser extracts accurate product and pricing information during the purchasing cycle. The supplier delivers the ASN to the purchaser, permitting loading...

...making the invoice redundant.

Although there are numerous variations of how ERS specifically works, there are several common elements:

1. Pricing Information - A list or **catalogue** of products and prices is sent by the supplier to its purchaser. The information has an agreed upon "shelf life" (30 days, 60 days, etc...

...becomes a part of the written contract.

Products/Goods Ordered - A purchaser using the pricing information sent by the supplier places an order.1Usually a **purchase order** specifying quantity, product type, price, freight, **tax**, etc. is generated. This **purchase order** may be sent electronically (EDI), via fax, or paper. This **purchase order** has a unique number for the specific order. Some purchasers do not issue a **purchase order** but rather place their goods order pursuant to the specific terms and conditions of ...In an EDI environment, ANSI X12 Transaction/Data Set 856 (Ship Notice/Manifest) is used. Note that transaction set 856 does not contain pricing or **tax** information.

4. Goods/Products Shipped-The supplier ships the goods with an itemized bill of lading or packing slip which references the **purchase order** or contract number.

5. Validation/Matching Process The purchaser matches the goods receipt (bill of lading, packing slip) to the ASN, **purchase order**, or contract to validate accuracy. Payment Process - Instead of responding to a supplier's invoice, the purchaser calculates payment based on price information stored in...

...use of bar codes. The computer system calculates the payment amount due by multiplying the unit price times the quantity received, accrual or payment of **tax**, and also takes pricing terms into account. The goods receipt date is used as the basis for taking discounts and determining the due date of...

...and eliminates lost discounts and the costs to create and print invoices.

b. Reduced Errors - Because there is less human intervention, fewer errors result. Checking **purchase order** numbers, quantity, pricing discounts, etc. are now automated.

Non-Value-Added Activities Eliminated - Mail opening, data entry, filing of invoices, voucher payment preparation, follow-up...

...Impact on Recordkeeping

The traditional recordkeeping function of the purchaser's accounts payable department in receiving the sales invoice, shipping/receiving documents, comparing and verifying **purchase orders** and then determining payment has been changed. Responsibility for valuation shifts to receiving/inventory or other departments. Pricing is predetermined based upon the **purchase order/seller's** price list. Thus, valuation to inventory/expense accounts is determined from "non-traditional" sources.

For the supplier, sales are based upon shipment rather than when sales invoices are generated. Exact sales amounts are determined by the purchaser. **Taxes** due are also determined by the purchaser.

What **Tax** Issues Are Created By the Use of ERS?

A number of issues are raised as businesses become more involved in electronic commerce. The use of...
...claims?

Issues Unique to ERS

1. Since there are no invoices generated by a supplier, what will be accepted as a valid receipt of sales **taxes** paid by the purchaser directly to the supplier?

2. Traditionally, the obligation to calculate and remit sales **tax** is imposed on the supplier. Since the supplier no longer has complete control over the **tax** calculation function, this becomes more complicated. How will the **tax** authorities cope with this changing environment? How will the supplier be able to document that the correct **tax** was paid?

ERS causes accounting and auditing issues different from conventional systems. Validating internal and inventory controls, no sales invoices, and a different method of...

...for taxing authorities. How will they deal with these challenges?

There may be discrepancies such as freight, price, or quantity adjustments that affect the sales **tax** base. What will be available and

acceptable to validate these changes from the original **purchase order** (goods order)?

Local **taxes** and home rule **taxes** may differ from state **laws**. How can these differences be addressed in an ERS system? Alabama, Arizona, California, Colorado, Illinois, Louisiana and others have different local **tax** rules that may apply differently than their state **tax** rules. This issue needs to be considered when using ERS.

6. Since a sales invoice may not be created involving an ERS transaction, what will be acceptable proof to support a claim for refund?

Many states' **laws** require that sales and use **tax** be separately stated. In the absence of an invoice, can this legal requirement be met by other documentation? What forms of documentation will be available...which identify business processes companies should consider when implementing ERS and make recommendations associated with ERS processes. Refer to Appendix A for publications information.

ERS - **Tax** Methodologies and Processes

Processing **tax** calculations in an ERS environment relies on standard taxation principles. Transactions between supplier and purchaser still require sales **tax** calculation when the supplier is registered to collect **tax** in the destination state. If the supplier is not registered to collect sales **tax**, the purchaser still must report and pay the consumer's use **tax**. It is key to understand the standard principles of taxation in order to then apply them to ERS transactions.

Types of Transactions2 and Definitions

Tax Verification-Traditional Invoice: This involves all payables transactions. The purchaser's system will verify that the correct amount of sales **tax** has been charged on taxable purchases. If the item is taxable and no **tax** was charged, the invoice will also be processed through the use **tax** accrual process. If **tax** was charged incorrectly, a procedure must be programmed to handle the exception.

2. Use **Tax** Accrual-Traditional Invoice: This transaction involves a systems calculation only on payables invoices that do not include sales **tax** charged by the supplier (includes sales, seller's use, vendor's use, and retailer's use **tax**). The purchaser's system will calculate the correct amount of consumer's use **tax** on the purchase.

3. Evaluated Receipts Settlement (ERS): This transaction is usually an electronic process whereby the purchaser submits an order to the supplier who...

...The purchaser then processes payment of the amount based on the order terms. The supplier issues no invoice. The purchaser must remit sales or

use **tax** with the payment based on the jurisdictions where the supplier is registered and would have collected **tax** had an invoice been issued. The purchaser's system will calculate the sales **tax** as if the supplier had issued an invoice. If no **tax** is calculated, the purchase will then be processed through the use **tax** accrual process.

Tax Verification Traditional Invoice

In order to have a **tax** calculation system verify the amount of **tax** charged, the purchaser must input **tax** charged as a separate item in the accounts payable system. Then the purchaser's MIS department can write a routine to compare the **tax** charged on the invoice to the **tax** calculated by the **tax** calculation system. The **tax** calculated should not be established as a **tax** accrual as it is only a comparison amount, not an amount to be paid.

Based on the results of the comparison, a decision tree needs to be determined. If **tax** was charged correctly or within a tolerance level, the invoice should proceed through the payables system for full payment.

If the invoice was appropriately exempt from **tax** and **tax** was not charged by the vendor, the invoice should proceed through the payables system for full payment.

If **tax** was charged incorrectly or the **tax** charged exceeded the threshold amount, the purchaser will need to develop an error procedure. This could either be to send the invoice back to the...

...appropriate exemption documentation for exempt items or a letter explaining the problem and requesting a new invoice. Or the invoice could be paid eliminating the **tax** charged with appropriate documentation provided to the supplier.

Invoices without **tax** or invoices determined to be taxed incorrectly will then be processed through the use **tax** accrual procedure.

6. Taxability matrices can be set up in two ways depending on the accuracy desired by the purchaser. For more accurate **tax** determination, the purchaser must set up their **tax** calculation system to mirror the parameters that the supplier would use to collect **tax**. This includes identification of where the supplier is registered to collect **tax** and where their "ship from" and "order acceptance" locations are. This will accurately calculate sales **tax** or use **tax** and the appropriate local **taxes**.

To calculate an approximate amount of **tax** that the supplier is charging, purchaser can use the same taxability matrices as for use **tax** accrual. However, this will not necessarily calculate the correct **tax** type (sales or use) or the correct local **tax**. The vendor may not be registered in the same jurisdictions as the buyer. This could be an issue with drop shipments and home-rule jurisdictions.

Use **Tax** Accrual Traditional Invoice

1. For the **tax** system to automatically recognize invoices without **tax**, the **tax** charged by the supplier must be entered as a separate item in the accounts payable system. Then the purchaser's MIS department can write a routine to send only invoices that did not include an entry to the **tax** system.
2. Taxability matrices in **tax** calculation systems would be based on the purchaser's nexus and taxability of products.
3. "Ship to," "ship from" and "order acceptance" addresses are necessary to determine **tax** type due (sales vs. use **tax**) and local **tax** rates for intrastate transactions.
4. Ship from and order acceptance addresses would be supplier's locations.
The purchaser will probably default order acceptance to match...
...use for taxability setup will depend on the complexity or simplicity of the purchaser's accounting system. Some suggestions for fields to use in defining **tax** exceptions are: vendor, product code, general ledger account/subaccount, cost centers, fixed asset project numbers, inventory codes, or location codes.

ERS - **Tax** Calculation/ Verification

In ERS, the purchaser must calculate **tax** as if the supplier was issuing an invoice. This will entail significant programming and system enhancements to transition from a traditional Accounts Payable environment.

Some third-party sales **tax** software products may be able to accommodate the complexities related to determining **tax** on ERS transactions. Others will not. Since the purchaser must calculate **tax** as if it was the supplier, an ongoing relationship between the two parties is necessary to maintain the taxability jurisdictions of the supplier for **tax** calculation by the purchaser.

2. Purchaser should not remit **tax** to the supplier for jurisdictions where the supplier is not authorized to collect **taxes**. In these situations, the purchaser must accrue and pay the use **tax** on taxable purchases. Many states do not authorize direct pay. Therefore, purchaser should not assume that it can pay all the **taxes** directly to the **tax** authorities as use **tax**. Also, the supplier may turn to the purchaser for payment of **tax** at a later date and double taxation may occur

3. To accurately calculate the sales **tax** that the supplier would charge, the purchaser must set up taxability matrices simulating the **tax**

authority of each supplier. It is important for the **tax** departments of both supplier and purchaser to communicate regarding the jurisdictions where supplier is registered.

ERS transactions will be processed first through the taxability matrices

simulating the supplier's **tax** authorities on the purchaser's system to calculate the **tax** "charged" by the supplier. **Tax** should not be established as a **tax** accrual since the **tax** is not being paid by the purchaser to the state. The purchaser will need to set up procedures to include the **tax** calculated with the payment of the ERS transaction.

5. If no **tax** was calculated through the taxability matrices either because the supplier is not registered in the delivery state, or because the ERS transaction is exempt, then the ERS transaction is processed through the use **tax** accrual process. A procedure may be written such that if after passing through the taxability matrices the ERS transaction is determined to be exempt, no pass to the accrual tables is necessary.

6. Since the order may include the **tax** amount, the purchaser may wish to have an interface to the order system to read the supplier taxability tables to calculate the **tax** for inclusion on the order system.

7. Because **tax** rates differ in some jurisdictions between sales and use **tax**, appropriate address information should be maintained to determine the correct **tax** type. This information includes the ship from, ship to and order acceptance locations for both the supplier and purchaser.

ERS - How Do Taxing Authorities Audit in This Environment?

Since ERS (Auto Pay) is a relatively new "business process," **tax** administrators are urged to educate their audit groups in this area. Appendix B provides a sample audit questionnaire that can be modified to meet specific **tax** authority and taxpayer situations.

Potential Solutions to ERS Issues

Steps that can be taken to address the ERS issues include the following:

Whenever possible, master...
...or other similar agreements should be entered into. Items that should be addressed in these agreements are: taxability of goods; discount terms; supplier's sales **tax** registration numbers; calculation and payment of sales **tax**; and agreement by both parties to cooperate in the event of a **tax** audit. An example of suggested **tax** language that could be included in such an agreement can be found in Appendix C.

The parties should agree to work together on audit issues...

...by taxing authorities. This may be more important and more frequently needed in an invoiceless environment.

The parties should work together to ensure that the **taxes** are calculated, sourced, and remitted correctly. Issues such as taxability, sourcing for local **taxes**, and timing for remittance should be thoroughly documented and agreed upon.

Trading partners should archive all pertinent electronic data and retain for audit purposes in the same manner as paper records. It is suggested that the following electronic records be archived and retained pursuant to taxing authorities statutes:

- a. Electronic **Purchase Orders** - Including **purchase order** number, supplier name, description of goods, quantity, price, discount terms, taxability of item, freight, **tax**, and account coding.
- b. Electronic Goods Receipt Data (Receiving Report) Including goods receipt reference number (receiving report number), date of receipt, supplier name, quantity received, description of goods, bill of lading or packing slip number, **purchase order** number, and contract number.
- c. Electronic Price Lists - Including all updates, changes, dates, etc. to support pricing on the **purchase order**
- d. **Tax Calculation Data** Including historical **tax** rate tables, matrices, and related data.

See Appendix D which identifies ANSI X12 EDI transaction sets currently used by some trading partners in conjunction with...

...authority should consider broadening or implementing direct pay authority statutes to accommodate taxpayers utilizing ERS and other advanced electronic processes.⁴ This would shift the **tax** compliance burden to the party that possesses the requisite information. The payment information generated and captured by the purchaser is more precise, therefore, the compliance level increases. Implementation of direct pay authority will require major **law** changes in some taxing jurisdictions.

6. Maintain documentation of the procedures utilized to enter the information pertaining to the ERS transactions into the accounting system and be prepared to explain to the taxing authorities.

7. Consider the use of "**tax** only" summaries or invoices to be sent by suppliers to purchasers to address valid receipt concerns. In the event

the supplier provides "**tax** only" invoices, the purchaser will need enough detail to trace the **taxes** back to the applicable transaction/payment in the purchaser's system to document for audit purposes and verify for accuracy.

8. Another possibility is for taxing authorities to recognize **purchase orders** as an "in lieu" invoice, consider ANSI X12 transaction set 856 generated by the supplier as an "in lieu" invoice, or some combination of the **purchase order** and transaction set 856 as an "in lieu" invoice.

Some purchasers send a monthly **tax** summary or statement to their suppliers. Purchasers that send a monthly statement to a supplier, summarizing by state taxing authority sales **taxes** paid, may be relieved of their **tax** liability in some jurisdictions. Other taxing authorities may not accept this premise, and may require additional documentation.

10. In the event the purchaser will be calculating sales and use **taxes** to pay the supplier, the supplier will need to provide the purchaser with the appropriate list of taxing jurisdictions, and their respective registration numbers, where supplier is qualified and registered to collect sales and use **taxes**. Without such information, the purchaser will need to remit the appropriate **taxes** directly to the taxing authority. This ensures that the purchaser does not make a voluntary payment of **taxes** to the supplier for a jurisdiction where the supplier is not able to remit such **taxes**.

(Table Omitted)

Captioned as: APPENDIX A

(Table Omitted)

Captioned as: APPENDIX B

(Table Omitted)

Captioned as: APPENDIX C

APPENDIX D

Footnote:

* Editor's Note: Barbara...

...chair of TEI's Advanced Technology Committee, Bill Zornes of Western Auto Supply Company, Barbara A. Timek of AT&T, and Jeffery P. Rasmussen, TEI **Tax** Counsel, represented the Institute on the steering committee of the task force.

Footnote:

' An order is defined to include any manner in which a purchaser...

...purchase goods or services.

Footnote:

2 The term "transaction" refers to the process used to account for payables invoices and electronic records.

Footnote:

3 The term "sales tax" includes sales tax, seller's use tax, and consumer use tax.

Footnote:

4 The joint FTA/Industry Task Force for Electronic Business Processes is addressing separately the development of a model uniform Direct Payment Authority statute. Currently, the majority of states that have a sales tax authorize direct pay in various forms.

Reference:

Contributing Organizations

Reference:

Federation of Tax Administrators 444 North Capitol Street, N.W., Suite 348 Washington, DC 20001 Telephone: 202/624-5890 Telefax: 202/624-7888 internet: <http://lh.vv.taxadmin...>

...Plaza 3350 Peachtree Road, N.E., Suite 280 Atlanta, GA 30326 Telephone: 404/240-2300 Telefax: 404/240-2315 Internet: <http://www.ipt.org>

Multistate Tax Commission 444 North Capitol Street, N.W., Suite 425 Washington, DC 20001 Telephone: 202/624-8699 Telefax: 202/624-8819 Internet: <http://www.mtc.gov>

Tax Executives Institute 1200 G Street, N.W., Suite 300 Washington, DC 20005-3814 Telephone: 202/638-5601 Telefax: 202/638-5607 internet: <http://www.tei...>

Descriptors:

...Corporate tax planning

Classification Codes:

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12/6/K/22 (Item 8 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

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01558646 02-09635

****USE FORMAT 7 OR 9 FOR FULL TEXT****

ArtSource: Selling art through catalogs

Jan 1998 **Length:** 6 Pages

Word Count: 2997

ArtSource: Selling art through catalogs

Abstract:

When developing the first **catalog** in 1990, ArtSource, a leading national supplier of framed fine and decorative art, had to contend with unfamiliar direct marketing concepts such as terms, damage claims, how to use the **catalog** and business concepts like hours, telephone access and payment. ArtSource prides itself on quality, from art selection to in-house production to installation.

Text:

Headnote:

When developing the first **catalog** in 1990, ArtSource had to contend with unfamiliar direct marketing concepts such as terms, damage claims, how to use the **catalog** and doingbusiness concepts like hours, telephone access and payment.

ArtSource is a leading national supplier of framed fine and decorative art in the middle-price...

...living facilities, hotels/restaurants/casinos and government facilities. It markets through architects, interior designers, independent reps and directly to end users.

Predominately, ArtSource is a **catalog** art company selling 70 percent of its paintings, worth \$2.8 million per year, through a **catalog** system. ArtSource created a full-service art supply concept in 1990 that includes **catalogs**, matting, framing, installation and art consulting services-all at one location. It satisfies corporate art buyers and commands a substantial market.

ArtSource now supplies corporate...

...and installation, and art leasing.

Traditional Art Buying

Throughout the 20th century, most companies and institutions purchased art

through galleries, print shops and art publishers' **catalogs**. Someone was designated the "art buyer" and had to find a local source, choose from a limited selection stacked in bins, pay full retail price...

...buyer frustrations. In 1990, she conceived a brand new way to sell corporate art that would eliminate the inherent problems.

Smith envisioned a business art **catalog**. Artwork would be shown framed and coordinated. Posters and decorative art would have the writing cropped, making them more appropriate as business art. The initial...

...Art Gallery You Can Visit Without Leaving Your Desk." Not only would art be less expensive but much of the hassle would be eliminated through **catalog** shopping right at the office.

The company stressed coordination. All artwork on a page and facing pages meshed together. Coordination was applied both to style...

...companies could buy compatible art that would hang well together in an office, hallway or waiting room. Sizes and color tones would match.

First ArtSource Catalog The first ArtSource **catalog** in 1990 was 50 pages. Business-appropriate art focused on landscapes, photography, nature scenes, florals, still lifes and abstracts. Current colors and middle-of-the-road art was selected specifically to match most business environments.

ArtSource distributed the first **catalog** to 10,000 buyers. The company bought lists and targeted corporations, hospitals, architects and interior designers. Their major target was facility managers at corporations employing...

...large pictures that could stand on their own. Thus, the final size of most pictures was 24"x30" to 30"x40".

When developing the first **catalog** in 1990, ArtSource had to contend with unfamiliar direct marketing concepts. These **included terms**, damage claims, how to use the **catalog** and doing-business concepts like hours, telephone access and payment.

(Photograph Omitted)

(Photograph Omitted)

(Photograph Omitted)

(Photograph Omitted)

(Photograph Omitted)

Captioned as: A popular line...

...imagery. The company has found that many buyers in both corporate and military markets select these pictures.

In the first days, staff members read every **catalog** they could find, especially from vendors serving their own industry. They studied, photocopied, clipped and determined the best wording for each situation.

ArtSource developed its second **catalog** in 1992. It was 100 pages, with some paintings retained and many new ones added. The company reworked most pages but continued the themes and groupings that made it easy to select matching art.

The third **catalog** in 1994 was 150 pages. ArtSource started anew, keeping some popular spreads, adding different art and satisfying customer demand for additional selections.

But the **catalog** was becoming larger and less efficient for many customers. Certain buyers needed only certain sections. Interior design customers did not want price lists bound-in...

...a given client. Staffers also needed something smaller and less expensive for casual requests.

ArtSource decided on a revolutionary change for the fourth and current **catalog**, printed in mid-1996. It changed from perfect binding to a large three-ring binder system that contains three distinct major **catalogs**, a summary sampler **catalog** and occasional inserts. Together, the system contains over 1,400 images on 233 pages, with art organized by style, artist and period.

Full **Catalog** System

The Contemporary Collection **catalog** displays ...pages. Each two-page spread presents themed groupings, with sections on abstract art, nature photography, abstract landscapes and a corporate motivation series.

The Transitional Collection **catalog** portrays art of this century with 84 pages and 600 total pictures. Predominant themes are garden and country scenes, landscapes, natural vistas, florals, coastlines and sailing, still lifes and tropical scenes. A supplement to this **catalog** was mailed in Fall, 1997 adding 24 pages and 144 images.

The Traditional Collection **catalog** has more formal art of the 19th and earlier centuries shown on 48 pages with 300 total pictures. Themes include English village scenes, hunting, ancient...

...still lifes, Victorian settings, Americana, folk art and farm scenes.

Impressionists featured include Monet, Renoir and Van Gogh. American artists include Winslow Homer.

The Sampler **Catalog** is a 52page compendium of the three major **catalogs**. It shows a total of 240 pictures taken from the full **catalog** system. The full line of 17 metal and 83 wood frames is also displayed. The customer benefits of purchasing through ArtSource are detailed for corporations, healthcare facilities, government facilities, small businesses, senior living settings and for hotels and restaurants.

The Sampler **Catalog** is generally the first communication piece for ArtSource. It satisfies bingo card inquiries, trade shows, phone calls that show modest interest, first callers, smaller projects...

...smaller projects and non-immediate needs. It is used as the basic marketing piece for cost-efficient first contact. ArtSource has distributed 20,000 Sampler **Catalogs** since 1996 including the initial 10,000 that were mailed immediately to existing customers and prospects and mailing list contacts.

Quarterly Supplements are produced with...

...while the Spring 1996 Supplement shows oversized prints to use on larger walls, such as lobbies or stairwells.

Desktop Publishing Benefits

When developing the current **catalog** system, Art-Source embraced desktop publishing technologies to speed production and slash costs. For example, the 1994 **catalog** required jobbed-out typesetting, scanning, photography and some copywriting. The company actually framed posters for photography and incurred \$8,000 in related costs, another \$60,000 in pre-press charges and \$60,000 more for printing. For the 1996 **catalog** system, all artwork was scanned in-house and all frames and mats were added electronically. ArtSource created the type and page layouts, saving \$75,000 in external charges.

Print runs were 10,000 for the Contemporary Collection **catalog**, 12,000 for the Traditional Collection **catalog** (to allow for a supplemental mailing of 2,000 to nursing home prospects) and 12,000 for the Transitional Collection (since it is the most popular **catalog**).

Three large **catalogs** make the process much more efficient. A-fe ,rrP rsn rework individual sections as needed, as important new art becomes available or other art goes out of print. It can better manage each component and update sections without updating the entire book. The company can mix and match **catalogs** to suit individual clients. It can update sections and send newer versions, whenever appropriate.

All **catalogs** are three-hole punched and fit into a binder, which has two pockets to serve client or interior designer needs. There is a separate free...

...The **orl** gallery you can visit without leaving your desk. A wide variety of colored mats are available to customize any art piece in the **catalog**.

Many master **catalogs** are sent to the government market. ArtSource sells to a under GSA governmental units under GSA contracts. They and reader-response-card senders receive new **catalogs**.

Other **catalogs** are shipped to qualified leads, solid referral request lists. Bulk mailing costs cover the **catalog(s)**, binder, box and postage. Sampler **Catalogs** cost \$3.50 to mail and are sent without charge. Complete **catalog** system costs \$10 to mail and are sent free to buyers and qualified prospects. Others pay \$30 each but receive \$100 worth of coupons to apply to future art purchases.

While distribution costs seem high, they let ArtSource operate from a single location. The **catalog** is also often the lead into more custom sales which are supported by independent reps in the field who expand ArtSource's sales staff. Although...

...of all pictures sold are images from an Art Source's sales staff. Although 70 percent of all pictures sold are images from an ArtSource **catalog**, the remainder includes more expensive fine (or original) art and custom installations of specialty decorative art. ArtSource offers design services such as custom art research...

...or automotive art for a factory). The customers on these larger projects are generally first introduced to the company through receiving one of the ArtSource **catalogs**.

(Photograph Omitted)

Finding and Tracking Prospects & Customers In 1995 ArtSource embarked on a substantial re-working of its customer database, using Microsoft Access as a industry codes, source of lead, area codes, **purchase order** numbers, and so on.

A free-form notes field is available to write out details of contacts and projects. The system tracks how many purchases...

...of artwork is appropriate for these facilities. The database allows staff to record when a particular contact has received either a sampler or a master **catalog**; when supplements are produced, those buyers with the Master System get these updates. Likewise, some contacts are not mailed

subsequent mailers, for example numerous designers at a large firm who have a central resource librarian who receives all **catalogs** and keeps for all to use.

The system is written so that staff can designate whether or not someone should receive mailings. Because the software...

...be quickly located.

Quotes are also stored there, so staff can quickly retrieve items quoted months before and talk intelligently with customers about their needs.

Catalogs Educate and Entertain In addition to displaying art, the company positions all its **catalogs** as educational and enlightenment pieces. Call-outs encourage people to read the **catalogs**, enjoy art and become art patrons. Biographies of select artists and occasional artist quotations make the spreads more meaningful.

There are also fascinating art tips...

...with one art genre and one or two frame styles. Keep the mat palette to five or fewer total colors.

(Photograph Omitted)

Selecting Art for **Catalogs** How does ArtSource select 1,400 paintings for its **catalogs**? Staff members maintain regular contact with 20 international art publishers and learn of new offerings. They know which art publishers sell best to end consumers...

...all paintings on customer floorplans and send a master installer to the client site. Usually, on orders under 25 pieces, customers select art from the **catalog**. On orders over 25 pieces, the customer and the ArtSource art consultant collaborate.

ArtSource prides itself on quality, from art selection to in-house production...

...plans, full-service installation, art donor programs and more. A special rebate program allows organizations to donate their existing art to charities, deliver the itemized **tax** receipt to ArtSource and receive a discount on artwork purchased. An unconditional money-back guarantee supports customer satisfaction.

Seven years ago, ArtSource reinvented the way art is sold to American business. It created a **catalog** sales system that enhances selection, raises quality and lowers cost. The company has earned widespread customer trust and powerful sales increases every year. ArtSource found a new

application for **catalogs** and in the process built a very successful business.

Author Affiliation:

Maggie Smith is president of Art,Source which is located in New Berlin, WI.

Descriptors:
Catalogs;

Classification Codes:

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/6/K23 (Item 9 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

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****USE FORMAT 7 OR 9 FOR FULL TEXT****

The art of asset management

Jul 1996 **Length:** 5 Pages

Word Count: 2401

Text:

...systems, such as Oracle Financials (PSDI is a partner in Oracle's Cooperative Application Initiative). Release 3.0 also features support for multiple currencies and **tax** rates, as well as facilities to share spare-parts information across store rooms located worldwide. Maximo running on the Sybase database is in "virtual beta..."

...Series Open Industrial System. Making maintenance management inherent in an automation system gives Foxboro's process-based customers real-time decision support for maintenance operations, **including** alarming **conditions**, equipment usage, and predictive maintenance.

Goodermote expects in 1996 to see CMMS viewed more as a corporate business system, not a departmental-level solution. "Maintenance...inventory carrying costs. Again, TSW uses the workbench metaphor to give buyer's one screen with supplier history, contract data, and other tools to handle **purchase orders** and delivery schedules. EPS also formats transactions, such as **purchase orders** and contracts, so that a third-party translator can map it to an approved EDI format.

All of these products have access to TSW's...

...began with Datastream's alliance with Grainger, a Niles, III.-based supplier of industrial and commercial equipment and supplies. An interface to Grainger's electronic **catalog** allows users to import purchasing data directly into Datastream's MP2 for Windows' inventory and purchasing functions. And a similar alliance with Wonderware Corp., Irvine...

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****USE FORMAT 7 OR 9 FOR FULL TEXT****

In defense of the sales statute of frauds and parole evidence rule: A fair price of admission to the courts

Fall 1995 Length: 22 Pages

Word Count: 10097

In defense of the sales statute of frauds and parole evidence rule: A fair price of admission to the courts

Abstract:

Some of the essential features of Sections 2-202 and 2-201 of the Uniform Commercial Code, the Parole Evidence Rule and **Statute of Frauds** presently applicable to Sale of Goods contracts are discussed. The discussion intends to demonstrate how the Parole Evidence Rule and **Statute of Frauds** serve as a key to the courtroom door: in effect, the price of admission which sales contract claimants must pay to institute judicial...

...should be retained and strengthened, which is being suggested for the parole evidence rule, UCC 2-202. However, there are current proposals to repeal the **Statute of Frauds**, UCC 2-201. This should be rejected.

Text:

...piece will review some of the essential features of Sections 2-202 and 2-201 of the Uniform Commercial Code, the Parole Evidence Rule and **Statute of Frauds** presently applicable to Sale of Goods contracts.

This discussion is not, however, intended to be a comprehensive discussion of these legal rules. These...

...as a comprehensive list of all of the available authorities on the subject.

This piece is intended to demonstrate how the Parole Evidence Rule and **Statute of Frauds** serve as a key to the courtroom door: in effect, the price of admission which sales contract claimants must pay to institute judicial...

...and, indeed, strengthened. In fact, this is being suggested for the parole evidence rule, UCC 2-202.

However, there are current proposals to repeal the **Statute of Frauds**, UCC 2-201. They should be rejected. Repeal of the Sales **Statute of Frauds** likely would bring about these unfortunate results: (1) An increase in litigation regarding alleged oral contract claims, and (2) An increase in judicial...

...things: (1) that a contract was actually agreed to, and (2) what constitute the words of that agreement.

These realities probably also explain why the **law** from time immemorial has exalted the written contract over the oral one. Recall, even the chief draftsman of perhaps the earliest known (and certainly one... prepare for their clients will be accepted as the clear and certain statement of the contractual relationship that has been agreed upon. And, our common **law** centuries ago responded to this felt need by developing the parole evidence rule; a rule whose essential purpose is to safeguard and protect our expectations...
...BEATING BACK THE ASSAULTS ON THE PAROLE EVIDENCE RULE

Notwithstanding, there have been ongoing assaults on the parole evidence rule.(6) Indeed, many studies and **law** reform commissions have concluded that the parole evidence rule no longer serves a valid purpose and should be repealed.(7)

Some judges have also gotten...either side to contradict the terms found in the writing with extrinsic contradictory evidence of alleged prior or contemporaneous agreements. This has always been the **law**.(13) Second, by reason of the legislative history and a new official note, it will become extremely difficult to add so-called consistent additional (non
...

...at only slightly better than chance levels in evaluating truth and

deception. Even individuals who make these judgments for a living (e.g., customs inspectors, law enforcement officers) are prone to error.(17)

b. Settlement Leverage

If such realities presented themselves, competent commercial and trial lawyers are painfully aware of their...
...of the contract. Such settlement payoffs have little relationship to the merits of the case. They are more like tribute payments which, unfortunately, can be **extracted** because of the **intrinsic** flaws in our judicial fact finding system.

C. A LESSON TO BE LEARNED

From this, we can learn an important, but seemingly self-evident, lesson
non-meritorious claims are barred even from opening the courtroom door.

II. THE STATUTE OF FRAUDS

If, for the reasons stated above, commercial justice is substantially furthered by the parole evidence rule, why not extend the advantage. Why not...

...the English parliament, in 1677, took the first step toward this goal
when it enacted an Act for the Prevention of Frauds and Perjuries. That **statute** listed a series of "important" contracts that would not be judicially enforced unless a memorandum signed by the party (or his agent)
to be charged...

...Among the "important" contracts were those for the sale of goods having a price of more than ten pounds. Comparable legislation, now known as the **Statute of Frauds**, was early enacted in just about every one of our states.(18)

Many believed this to be an excellent **statute**.⁽¹⁹⁾ But, like the Parole Evidence Rule, the **Statute** of Frauds brought protests and criticisms.⁽²⁰⁾ One criticism that had particular impact was a 1937 Report by the English **Law** Revision Committee.⁽²¹⁾ The major complaint (but not the only one) was that the **Statute** of Frauds caused more fraud than it prevented. According to these critics, this was because the **statute** permitted "welshers" to avoid their obligations under an oral contract which actually had been made, simply because the "technical" or "formal" requirement for a signed writing could not be produced.⁽²²⁾

These criticisms, particularly those found in the 1937 Report of the English **Law** Revision Committee, persuaded the British in 1954 to

repeal much (but not all) of their **Statute** of Frauds, including the sections dealing with the Sale of Goods. However, they did not persuade Karl Llewellyn and his colleagues who drafted the original Commercial Code.

They apparently remained convinced that a **Statute** of Frauds for the Sale of Goods contracts furthered commercial justice, not detracted from it. Thus, their decision was not to repeal the **Statute** of Frauds dealing with the Sale of Goods. Instead, they decided to rewrite it, adding provisions designed to overcome the legitimate objections which had been leveled against the original **statute**.

A. UCC 2201: AN UPDATED SALES **STATUTE** OF FRAUDS

Their end product is the **statute** now found in current UCC 2-201. First, it made clear that the entire sales contract need not be reduced to writing. The required signed...

...to others than this particular buyer, and, the payment for or acceptance of the goods by the buyer.

1. Impact of Judicial Admission

The new **statute** added another device which made oral agreements enforceable and which is particularly worth noting; namely, that the defendant admits in judicial proceedings that the oral...

...who actually made an oral contract defeat it simply because the other side can not produce the technical writing, the major criticism of the original **Statute** of Frauds. These "welshers" now can succeed only if they are prepared to suffer both the criminal consequences of perjury and the wrath of the...

...admission, or other objective observable action to support the existence of the oral sales contract, then the courtroom door is closed to him. This new **Statute** of Frauds also was subject to criticism.(26) But, it struck me that many of these criticisms were repetitions of those leveled at the original **Statute** of Frauds; complaints that it was wrong to let the "welsher" get out of his contracts, simply because the plaintiff could not produce the necessary signed writing. So many of the critics seem to have ignored the fact that current UCC 2-201 was a much improved **statute** designed to meet the legitimate historical criticisms; and that, effectively, ...revising Article 2 to repeal UCC 2-201.(28) If their proposals are ultimately accepted by the sponsoring bodies and the state legislatures, then the **Statute** of Frauds with respect to the sale of goods will no longer exist.

B. IRONY AND COMMERCIAL NONSENSE: THE CONTRAST BETWEEN THE PAROLE EVIDENCE RULE AND THE **STATUTE** OF FRAUDS

The irony of the situation is readily observable. If the parties have, in fact, agreed to a sales contract which they reduce to...

...mentioned in the drafting committee's official notes. The same is true in the 1937 British report which led to the British repeal of its **Statute of Frauds**. It concentrates on the problems of perjury in court, but never mentions the litigation realities raised by the perjurer who is still willing to threaten litigation or even to institute it.(34)

I repeat: It is not enough for the **law** to say that the judicial fact-finding process somehow (and, perhaps, even most often) will separate the truth from the falsehood. The beauty of present...

...this power gives to him and the concomitant burden which it puts upon the other party.

This, I submit, is a worthy goal for the **law** to pursue. We need to depart from the mindset (so prevalent, in particular, among academics who

do not have to face the realities inherent in...

...Judge Posner has aptly put it:

And yet it seems to us as it did to the framers of the Uniform Commercial Code that the **Statute of Frauds** serves an important purpose in a system such as ours that does not require that all contracts be in writing in order to...was reached (as opposed to one party's unilateral belief of an agreement by reason of some misunderstanding or miscommunication), then I submit that the **law** is fully justified in asking that party to undertake an additional minor burden before the courtroom doors are open to him. He should be required to get that minimum writing required by the current **Statute of Frauds**. And, if both parties actually understood that an agreement was reached, it is hard to believe that a request for the signed writing...
...a price to charge? Not in today's modern world with its routine use of file memos recording important oral conversations, the routine sending of **purchase orders** and sales confirmations by mail, FAX transmissions, E-mail, and voice mail, or recorded on computer databases.(38) Nor should we overlook the widespread use...

...its usefulness. I disagree and concur with views so cogently expressed by Karl Llewellyn nearly sixty years ago:

After two centuries and a half the **statute** stands, in essence better adapted to our needs than when it first was passed...The idea, which must

in good part derive from the **statute**, that contracts at large will do well to be in writing, is fairly well abroad in the land. "His word is as good as his..."

...personnel kept track of; the practice of confirming oral deals in writing, the use of typewriters, of forms--all these confirm the policy of the **statute**; all these reduce the price in disappointments exacted for its benefits.(39)

For the reasons previously stated, I submit that UCC 2-201 today is even more consistent with how modern business practice actually operates, and,

indeed, how the commercial community expects and desires the **law** to operate.(40) Ironically, this seems to be recognized by the latest official

note accompanying the proposed repeal of UCC 2-201 which states that "...Even without a **Statute** of Frauds, sellers and buyers will in most cases include some, if not all, terms of the contract in a signed record."(41) If that is what most parties do, shouldn't that be the basis

for our rule of **law** rather than the other way around where we protect (and incidentally also give a great deal of settlement leverage) to

those few who do not...is far from perfect, nor can we ignore the evidence

on the imprecision of oral communication. Where it is possible to do so,

rules of **law** should be fashioned to increase the likelihood that judicial judgements are based on the actual facts and not on mistaken fact findings.

E. OTHER ARGUMENTS...

...of UCC 2-201.

1. Copycat

One argument was to follow the example already set in the International Sale of Goods Treaty (which has no **Statute** of Frauds)(42) and also the example set by the British when they repealed their **Statute** of Frauds in 1954. The drafting committee then asserts that there was no showing that the "English fact-finding process is unable to weed out... . . . Apparently, the drafting committee simply accepted the statement as an article of faith.

Further, the committee ignored the fact that the British, while repealing the **Statute** of Frauds with respect to sales of goods, did not do so

with respect to suretyship contracts and real estate contracts.(44) Thus, if the...

...to support it with some kind of judicial admission or other objective evidence regarding its existence.

And, finally, it should be emphasized that the British **Statute of Frauds** with respect to the sale of goods was the original **Statute of Frauds**, not the same one which is now found in UCC 2-201. As previously discussed, current UCC 2-201 was a far more enlightened **statute** than its predecessors.(48) It faced up to and dealt with the legitimate objections to the original **Statute of Frauds**. Thus, present UCC 2-201 does not, as those who favor repeal have stated, deny enforcement "...of oral bargains that were clearly made but not in required [written] form,"(49) as may have been true under the original **Statute of Frauds** repealed by the British. To the contrary, under current UCC 2-201, we deal only with situations where the parties under oath honestly...

...the agreement. Karl Llewellyn and his colleagues who drafted current UCC 2-201 acted far more wisely than did the British when they repealed their **Statute of Frauds**. If one is to play copycat, I suggest it would have been better if the British followed Karl Llewellyn's approach in drafting...

...of repeal.

2. Change in Judicial Evidentiary Rules

Almost all who have proposed repeal of UCC 2-201, including the UCC Drafting Committee, the English **Law Revision Commission**, the Canadian Studies, and others, have noted that judicial procedures and evidentiary rules have changed since the enactment of the original **Statute of Frauds**. In particular, they note that the litigants themselves could not testify back in 1677. Although they have been able to do so for the past several hundred years, this just recently has been perceived as a reason to repeal the **Statute of Frauds**.(50)

But isn't it the other way around! It is precisely because litigants today can testify that a **Statute of Frauds** is needed even more. It is the litigant's self-interest in winning that "motivates" him more than a third-party witness ...its repeal.(52) Are they suggesting that the quantity of litigation will decrease following repeal? I suggest the likelihood is to the contrary. If the **Statute of Frauds** is repealed, all stops are out. There will be no limitations to inhibit anyone who claims the existence of an oral contract to...

...to UCC 2-201. As I have previously written, the better reasoning is with those courts who do not find a judicial exception to the **Statute of**

Frauds based on reliance.(55) Perhaps this better reasoned approach needs to be directly stated in any rewrite of UCC 2-201.

5. Quantity...

...agreed to. These include the subject matter of the sale and the quantity of the goods to be sold. There simply is no way the **law** (or a judge) can tell the parties what to sell, or the quantity of goods that must be sold. This is something which the parties...

...Undoubtedly, some problems do exist with UCC 2-201. Some, like the erroneous judicial holdings that detrimental reliance is a mechanism for getting around the **Statute**, can easily be dealt with in any rewrite in UCC 2-201. Whatever other problems exist with the current drafting of UCC 2-201 (and the judicial holdings thereunder) are minimal. They, too, easily can be corrected in any rewrite of the **Statute**.

Karl Llewellyn and his colleagues took a giant step forward when they wrote UCC 2-201. We can now stand on their shoulders and, where... ...basic approach of current UCC 2-201 makes far more commercial sense than would be its outright repeal. Indeed, a corrected--perhaps even an expanded--**Statute** of Frauds might bring us closer to achieving that elusive thing called justice.

Note: Readers who wish to express themselves on the desirability of retaining or repealing the **Statute** of Frauds may mail their comments to the National Conference of Commissioners on Uniform State **Laws**, 676 North St. Clair Street, Suite 1700, Chicago, IL 60611, Attn: Uniform Commercial Code Revision Project-Article 2.

NOTES

1. Several of these studies are...February 27, 1995, page A7.
5. Exodus XXXI, 18.
6. Sweet, Contract-Making and Parole Evidence: Diagnosis and Treatment of a Sick Rule, 53 CORNELL **LAW** REVIEW 1036 (1968); Comment, The Parole Evidence Rule: Is It Necessary?, 44 N.Y.U.L. REV. 972 (1969).
7. The Ontario **Law** Reform Commission urged his repeal, and noted that this has been the recommendation of the English **Law** Commission and The **Law** Reform Commission of New South Wales. Report on Sale of Goods Volume One at pages 114-116 (1979). A subsequent Canadian Report proposing a Uniform Sale of Goods Act adopted the Ontario recommendations.

Report Number 38 at page 235 (October 1982), published by the Institute of Law Research and Reform, Edmonton, Alberta.

8. Delta Dynamics, Inc. v. Arioto, 69 Cal.2d 525, 532, 446 P.2d 785, 789, 72 Cal. Rptr. 785...

...dissenting).

9. UCC 2-202(b).

10. Proposed UCC 2-202 of Uniform Commercial Code, Revised Article 2, December 1994 draft (copyrighted by the American Law Institute and National Conference of Commissioners on Uniform State Laws).

11. Reporter's draft revision of Article 2, dated April 2, 1992, Section 2-202, Official Comment I.

12. Official Note 2 to proposed UCC...

...Comment 2.

14. See authorities, *supra*, in footnotes 6 and 7.

15. See Bedau and Radelet, *Miscarriages of Justice in Potentially Capital Cases*, 40 STANFORD LAW REVIEW 21 (1987). "The authors "...present 350 cases in which defendants convicted of capital or potentially capital crimes in this century, and in many cases...

...to death, have later been found to be innocent. Our findings prompt us to echo the words of an earlier investigator who noted that the catalog of erroneous convictions "could be extended, but if what has already been presented fails to convince the reader of the fallibility of human judgment then..."

...Other studies showing the fallibility of judicial fact-finding are found in Kassin, *The American Jury: Handicapped in the Pursuit of Justice*, 51 OHIO STATE LAW JOURNAL 687. Among many other things, Kassin discusses how jurors deal with conflicting testimony. See also Conley, O'Barr and Lind, *The Power of Language Presentational Style in the Courtroom*, DUKE LAW JOURNAL, Volume 1978, at page 1375. The authors note that "The research reported in this article provided substantial evidence that a witness' testimonial style [not...]

...17. Kassin, *supra* footnote 15, at page 688.

18. II Farnsworth On Contracts (Little, Brown 1990) at page 82 and following.

19. A 1937 English Law Revision Committee Report, reprinted in 15 Canadian Bar Review 585 (1937), quotes statements from Lord Kenyon: "One of

the wisest laws in our **statute** book." and Lord Nottingham: "Every line of it was worth a subsidy." Page 588 of 15 CANADIAN BAR REVIEW.
Many others have expressed like sentiments...

...following.

20. Ibid, at page 588 which quotes Lord Campbell as stating: "The act promotes more fraud than it prevents." Many other criticisms of the **statute** are noted in this Report. And, there are many other persons on both sides of the Atlantic Ocean who have joined in these criticisms.
Some...

...man to break a promise with impunity, because he did not write it down
with sufficient formality." See ibid at page 589 which quotes from LAW QUARTERLY REVIEW, 1885, Vol. 1, P.1.

23. Official Comment 1 to UCC 2-201. 24. D.F. Activities Corp. v. Brown,
7th Circuit 1988...

...to sell the goods."

25. For a spirited defense of and a comprehensive discussion of the compelled admission, see Yonge, The Unheralded Demise of the **Statute** of Frauds Welsher in Oral Contracts for the Sale of Goods and Investment Securities, 33 WASHINGTON AND LEE LAW REVIEW 1 (1976). Some cases rule that discovery is possible even though the defendant has denied the existence of the oral contract in his answer...

...cited in footnotes 6 through 10 (and accompanying text) of Preliminary Report of P.E.B. Study Group, Uniform Commercial Code, Article 2 (copyrighted American Law Institute and National Conference of Commissioners on Uniform State Laws 1990), at page 50-51. Canadian studies also have been critical both of the original **Statute** of Frauds and UCC 2-202 and have urged repeal in Canada. See Ontario Law Reform Commission Report, *supra* footnote 7, at page 107 and following, and Report No. 38 sponsored by Institute of Law Research and Reform, *supra* footnote 7, at page 129 end following.

27. The Canadian Reports cited in the previous footnote, footnote 26, acknowledged that UCC...

...Ontario Report then stated that "...these modifications would have much to commend them. But, in our view, there is no [intrinsic] merit to retaining a **Statute** of Frauds requirement."

28. These committees have been studying the problem for several years. The latest draft available to me which urges the repeal of...

...authorities noted, *supra*, in footnotes 1 through 4.

37. I think Professor Vold got it right when he argued that the "cases that justify the **Statute** are...the thousands of uncontested current transactions where misunderstanding and controversy are avoided by the presence of a writing which the **statute** at least indirectly aided to procure...." Vold, The Application of The **Statute** of Frauds Under the Uniform Sales Act, 15 MINNESOTA **LAW REVIEW** 391, 393-94 [1931], quoted in Preliminary Report of PEB Study Group, *supra* footnote 26.

38. Any rewrite of the Uniform Commercial Code should make clear that writings stored or transmitted by electronic means will be recognized as signed writings for **Statute** of Frauds purposes. This, in fact, is now being considered. See PEB Study Group: Uniform Commercial Code, Article 2 Executive Summary, 46 **THE BUSINESS LAWYER**...

...for which the record was generated or communicated in light of all the circumstances.

39. Llewellyn, What Price Contract? An Essay in Perspective, 40 **YALE **LAW JOURNAL**** 704, 747 (1931).

40. The Ontario **Law** Reform Commission Report, *supra* footnote 26, at page 109 cited a study where business persons "...still appear to attach considerable importance to the existence of...

...seems to reflect many a lay man's view about the sanctity of a written commitment and the fragility of the verbal promise." However, the Ontario

Law Reform Commission was puzzled by the results of this survey which was contrary to their view that the **Statute** of Frauds should be repealed. Thus, the Commission gratuitously chose to ignore it, rationalizing that business persons "...are willing to subscribe to a **Statute** of Frauds requirement without apparently appreciating the serious inequities caused by the **Statute** of Frauds...it would surely be unwise to use this particular set of answers as a reliable guide to the future disposition of [the sales **statute** of frauds]."

41. Official Note 2 to proposed UCC 2-201 (December, 1994 draft), *supra* footnote 10.

42. "[But] a contracting state may protect its domestic **Statute** of Frauds by making a reservation under Article 96. (The United States has not made a reservation). In addition, the parties may impose or agree...

...and authorities cited in footnotes 1 through 4, *supra*.

48. See *supra* in text at Item 2(A), entitled UCC 2-201: An Updated Sales **Statute** of Frauds.

49. Para. 1 of Purposes of Changes for Section 2-201 of UCC Draft Revision,
Part 2, dated April 2, 1992, *supra* footnote...Purposes of Changes,
Paragraph 2, *supra* footnote 26.

55. See Shanker, *Judicial Misuses of the Word Fraud to Defeat the Parole Evidence Rule and the Statute of Frauds*, 23 AKRON LAW REVIEW 1 at page 16.

56. *Advent Systems, LTD. v. Unisys Corp.*, 3d Cir. 1991, 925 Fed.2d 670, 677.

57. The "gap fillers" for...

...are now found in UCC 2-305 to 2-311.

58. I briefly discussed this fundamental contract principle in *Shanker, Contract by Disagreement!*?, 81 COMMERCIAL LAW JOURNAL 453 (1976), at page 456 and following. Also see *U.S. Advent Systems LTD. v. Unisys Corp.*, *supra* footnote 56, a case which actually...

...paid for. Presumably, it also is enforceable for any quantity which the defendant judicially admits.

* Morris G. Shanker is the John Homer Kapp Professor of Law at Case Western Reserve University in Cleveland, Ohio.

I acknowledge and thank Ms. Judith Kaul, Technology Reference Librarian at the Case Western Reserve University Law School, for her assistance in uncovering the social science authorities cited in this article.

Descriptors:

...Contract law;

Classification Codes:

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/6/K/25 (Item 11 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

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00983546 96-32939

****USE FORMAT 7 OR 9 FOR FULL TEXT****

Legal aspects of salesperson commission payments: Implications for the implementation of commission sales programs

Winter 1995 Length: 16 Pages

Word Count: 7532

Abstract:

...of the relationship between the salesperson and the selling firm are explored with regard to the payment of commissions. In addition, the aspects of agency **law**, contract **law** and state statutory **law** which impact the payment of sales commissions are reviewed. Implications for sales managers are also presented.

Text:

...salesperson and the sales firm, or between the salesperson and the customer, is strained. When this is coupled with the complexity of the body of **law** concerning payment of commissions, it suggests that managers and salespeople can make costly mistakes about the timely payment of earned commission. Managers and salespeople should be familiar with the **laws** governing compensation before problems arise. This task is difficult because managers and salespeople are faced with a Byzantine network of **laws** that govern all aspects of commission agreements, particularly if the sales territory spans two or more states. For example, a wide-ranging body of **law** covers issues from defining the relationship between the salesperson and the principal/employer, to specifying the amount of exemplary damages a sales representative may receive if commissions are not paid in accordance with the **law**. In addition, recent changes in state statutes are numerous. Almost half of the 29 states which have specific statutes dealing with the payment of salesperson...

...payment of commissions. This review is based on an integrative model of the relationships between the principal/employer, sales/agent and customer based on contract **law** and agency **law**. This model is shown in Figure 1. (Figure 1 omitted) It offers direction to sales managers and salespeople for the design and implementation of compensation plans. An understanding of the **law** can help avoid disputes about commission payment, or can reduce the resulting time and cost of problems if disputes do arise. The paper's framework also assists researchers interested in issues of **law** or the implementation of commission-based compensation systems. The paper will review the relevant aspects of agency **law** and contract **law** which impact the payment of commissions, and will offer a review of the case **law** and statutory rules relating to commission payment. In addition, we offer managerial implications and research suggestions based on the review.

Agency **law** and contract **law** define legal principles which guide the relationship between the salesperson and higher organization, and between the principal and the customer. Agency **law** defines the general responsibilities of the principal and agent, while contract

law affords the basis for interpretation of any specific (and/or contrary) agreements made between an individual agent and the principal.

Both agency law and contract law also define legal principles affecting the relationship between the principal/employer and the third party/customer. Agency law determines the effectiveness of the agent's action in binding the principal to the transaction. More importantly for purposes of this paper, contract law principles define the existence of a legally binding contract between the principal and the customer.

Figure 2 contains a concise outline of the commission payment...

...can be used by managers (and which have been used by courts) to determine the implementation of commission payment plans. The following section on agency law, contract law and state statutory law are summarized and integrated in the framework presented in Figure 2.

Agency Law

In a general sense, agency law refers to the general **duties** owed by the principal/employer to the agent, and by the agent to the principal/employer. Agency law also speaks to the effectiveness of the salesperson/agent's acts to bind the principal and the customer via the sales transaction. An agency relationship...

...the property and confidences of the principal for the purpose of carrying out the agency. Because of the potential for abuse of this power, the law views the agency as a fiduciary, or trust-based relationship (Restatement [Second] of Agency, 1, 1958). The law, therefore, imposes certain fiduciary **duties** on the agent (salesperson). These **duties** include: 1) the **duty** to obey the instructions of the principal, 2) the **duty** to act with due diligence, 3) the **duty** to account for the principal's property, 4) the **duty** to notify the principal of information relevant to the agency, and 5) the **duty** of loyalty. Breach of these **duties** can be the basis for termination of the agency, can cause the agent to forfeit the right to compensation for services, and can subject the...

...caused to the principal (3 Corpus Juris Secundum, Agency secs 268-317, 1973, 1993).

The principal also owes certain responsibilities to the agent/salesperson.

These **duties** include: 1) the **duty** to comply with the terms of the agency agreement, 2) the **duty** to act in good faith and cooperate regarding the agency purpose, 3) the **duty** to reimburse the agent for reasonable expenses incurred in carrying out the agency, 4) the **duty** to indemnify the agent for liabilities incurred in carrying out the agency, and 5) the **duty** to warn the agent of any known risks associated with

carrying out the agency (3 Corpus Juris Secundum, Agency secs 268-317, 1973, 1993).

Agency Law and the Payment of Commissions

When an agent has been retained to solicit or sell on behalf of the principal, and the agent's compensation...change the court's adherence to the rule equating performance to obtaining an enforceable contract [93 S. W. 755 (Ark. 1906). A discussion of contract law as it impacts these issues follows this section.

The second rule applies when the agency agreement contemplates that the agent will be paid commissions on...

...though the contracts were finalized by the principal [Brea v. McGlashan, 39 P.2d 877 (Cal. 1935)].

On the other hand, when the agent's **duties**/performance encompass some post-contract activity, such as collection of payment or provision of some service, courts have enforced contract provisions terminating the right to...

...collect payments due, he was not entitled to commissions on some business booked during the agency because collections (specified as part of the agent's **duties**) were made after termination of the agency [H.R. Monroe v. Grolier Society of London, 281 P. 604 (Cal. 1929)]. Likewise, the court enforced a...

...the purchasers' specifications, and financing arrangements [Johnson v.

Peterbilt of Fargo, Inc., 438 N.W.2d 162 J.D. 1989)].
Issues of Termination under Agency Law

There are special issues which arise relative to the payment of commissions when the agency relationship is terminated. The first issue is whether the principal...

...In the context of non-exclusive agencies, the courts' inquiry has been whether the principal is unfairly profiting from the agent's efforts (12 American Law Reports 2d 1360, Section 2, 1950). This query has produced mixed results. For instance, in one case, an agent with a non-exclusive agency was...sales made through those outlets [340 F.Supp. 1158(E.D.Mo. 1972)].

To sum, the principal/employer's obligation to pay commissions under agency

law hinges on whether the agent has performed his or her **duties** under the agency contract. The first source for determining performance is the contract between the agent and the principal. If the contract is unclear as...

...been a reasonable opportunity to complete the performance. Finally, agents are sometimes entitled to commissions on renewal orders even after the agency is terminated.

Contract Law

Contract **law** provides some guidance to determine if and when a sale actually has been made, because it specifies the conditions for a binding agreement between the...

...the principal and the customer. This is an important aspect of designing compensation plans (Churchill, Ford and Walker 1993, p. 589-590). According to contract **law**, an offer is a statement of reasonably definite terms, directed to and communicated to a reasonably identified offeree, or customer. The offer gives an objective...

...the intent to be bound by the offeree's acceptance (17 Corpus Juris Secundum, Contracts, secs 34-38, 1963, 1993). Based on practical considerations, contract **law** treats advertisements, price circulars, and **catalogues** as invitations to do business, inviting others to purchase the advertised product or service according to the specified terms
(17 Corpus Juris Secundum, Contracts, sec...

...finds a qualified buyer for a property according to pre-set terms for the sale.

Offers are effective until revoked or terminated by operation of **law**. Revocation of an offer is effective when it is communicated to the offeree, or when the offeree receives information causing him or her to realize...

...17 Corpus Juris Secundum, Contracts, 39-42, 1963, 1993).

The Mailbox Rule

Problems can arise when a seller receives notice of revocation of the offer/**purchase order** after having issued an acceptance of an order. In other words, the seller's acceptance and the buyer's revocation can "cross in the mail." For this reason, contract **law** specifies that an acceptance is deemed to be effective upon its dispatch, rather than upon its receipt, as long as it was dispatched in a...business to business) situations. Often, parties thought they had a contract after the exchange of necessary paperwork, but a contract did not exist under common

law because of different pre-printed terms on each party's papers. Furthermore, if performance in response to a "counteroffer" gave rise to a contract, the...

...2) the new terms materially alter the original terms or 3) the offeror gives timely notice of objection to the new terms.

Applicable (State) Statutory Law

In addition to the general laws regarding agency relationships and contracts, over half of the states have enacted legislation dealing with a principal's obligation to pay commissions to sales representatives... referenced in these tables are available from either author.

First of all, the definitions sections of the statutes (Table 1) outline the coverage of the **statute** by defining the terms "principal" and "sales representative." Almost all of the statutes define a "principal" as a manufacturer, producer, importer or distributor of a product at the wholesale level. However, a slight majority of the statutes further limit that term to include only those business entities that have no permanent or fixed place of business in the state. A significant number of other states' statutes make no such distinction between out-of-state and in-state principals. The laws in Florida, Texas and Pennsylvania, all aimed at out-of-state principals, were determined to violate the Commerce Clause of the United States Constitution by...

...on goods ordered before the last day of employment, even if delivered and accepted after termination of the agency) to a general statement of common law principles (i.e., look to the agency contract, past practices of the parties, and custom in the local industry).

Many, but far from all, of...impose some limitation on the principal's right to terminate the sales representative's contract, usually by requiring a notice period. However, (through a separate **statute**) Minnesota requires good cause, a significant notice period and an opportunity for the agent to correct his/her conduct before a principal can terminate the...

...a lawsuit for unpaid commissions by magnifying the damages and reimbursing a successful plaintiff for the costs of prosecuting the suit.

Finally, most of the **statutes**, as shown in Table 3, also prohibit waiver of their provisions in any agreement involving a covered sales representative relationship.

Managerial and Research Implications

A strong legal foundation is an important aspect of the sales manager's position. Recent attention to the **laws** affecting salesforce recruiting and selection (Shepherd and Heartsfield 1991), the legal dimensions of salesperson's statements (Boedecker, Morgan and Stoltman 1991) and salesperson sexual harassment (Fine, Shepherd and Josephs 1994; Swift and Kent 1994) exemplify the manager's need to stay abreast of **laws** and court decisions which affect the sales management function. Selling firms, sales managers and salespeople should familiarize themselves with basic agency **law** and contract **law**, and should be aware of restrictions imposed by the statutes of the state(s) in which they transact business. Based on our review, we offer...

...a valuable part of recruiting and training activities, salespeople should be made to understand the definition(s) of performance, as well as the state-specific **laws** which govern the relationship between the principal and the agent. It has been pointed out that changes in the legal environment occur with no predictable regularity, and sales material should be revised whenever a relevant court opinion is issued or **statute** is enacted (Boedecker, Morgan and Stoltman 1991). The job description and subsequent training should include termination issues, and should spell out for the agent how...

...expected to be familiar with the legal aspects of compensation to avoid costly lawsuits, many aspects of compliance with the letter and spirit of the **laws** reviewed here are congruent with accepted theories of selling and sales management. An expectancy theory view of salesperson motivation (e.g., Evans, Marheim and Schlacter...performance, and reduced turnover and job tension.

From the salesperson's perspective, this review suggests that salespeople should also be familiar with the body of **law** governing their profession. When a salesperson does business in more than one state, or moves to a different state, he or she should learn the applicable state **laws**. A salesperson who contemplates quitting a job or terminating an agency relationship must be aware of the consequences of the termination on the payment of...

...exactly what payments are due, to make an informed choice about termination. Similarly, a salesperson who is terminated involuntarily should know the fundamentals of the **law** so that an employer does not (perhaps unwittingly) take advantage of the salesperson. No salesperson should rely on the knowledge or compliance of the employer...

...Each will be discussed briefly below.

1. In terms of descriptive research, a general understanding of sales

organization and salesperson awareness of and compliance with **laws** is lacking. Research is needed to understand the extent to which sales managers and salespeople are knowledgeable about the **laws** governing the payment of commissions. This type of research would identify needed training topics. This research could also explore and suggest changes to the practice of recruiting both salespeople and sales managers, to make sure that all parties are aware of relevant **laws**.

The second area of descriptive research concerns organization or SBU-level compliance with relevant **laws**. The **law** in this area is complex, and because state-level **laws** can change frequently, firms or sales managers may not be complying with the **law** simply because they are not aware of the **laws** or of changes in previous **laws**. This descriptive research could provide an understanding of the percentage or types of firms that might be unknowingly subjecting themselves to litigation.

2. The relationship...

...between the principal and agent (see Lewicki et al. 1994, Chapter 4)?

To conclude, we have summarized and integrated the body of agency and contract **law** as it applies to the payment of sales commissions. In addition, we have reviewed the state statutory **law** regarding sales commissions. Rather than viewing the **laws** governing commissions as a "necessary evil," sales managers/principals and salesperson/agents can view the **laws** as a part of the sales environment which must be monitored and evaluated as part of the selling strategy. As such, sales and sales management strategies and tactics can be planned to take advantage of knowledge of the legal foundation of business practice.

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12 American **Law** Reports 2d 1360, sec 2, The Lawyers Co-operative Publishing Col, Bancroft-Whitney Co. (1950).

Albright v. Kalbitzer, 62 F. Supp. 815 (E. D. Pennsylvania...W. 2d. 327 (Nebraska, 1981).

Palmer-Lucas, Inc. v. Martin's Herend Imports, Inc., 827 F. Supp. 345 (W.

D. Pennsylvania 1993).

Restatement of the **Law**, Second, Agency, American **Law** Institute Publishing, 1958.

Restatement of the **Law**, Second, Contracts, American **Law** Institute Publishers, 1973.

RLM Assoc. v. Carter Mfg. Corp., 248 N. E. 2d 646 (Massachusetts 1969).

Rosenfeld v. Lu. 766 F. Supp. 1131 (S. D...

...Franke received her Juris Doctor at the Ohio State University and her

undergraduate degree at Smith College. She is currently an assistant professor of business law at the Fisher College of Business at the Ohio State University. Professor Franke has published in the American Business Law Journal and several other law journals. Her major research focuses on issues of employment law and affirmative action, and her teaching experience is in legal environment and institutional management.

Authors' names are listed alphabetically as each contributed equally to the

...

Descriptors:

...Contract law; ...

...State laws;

Classification Codes:

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/6/K/26 (Item 12 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

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00728021 93-77242

****USE FORMAT 7 OR 9 FOR FULL TEXT****

PC System Sets New Standard

Aug 1992 **Length:** 3 Pages

Word Count: 1343

Abstract:

...mailings, and purchases, for easy analysis. Pricing options are another one of DM/Edge's useful functions. Prices can be specified at 3 inventory levels (catalogs, SKUs, and locations), allowing exception prices at the SKU and single-bin levels for single warehouse specials. Price blocks (each with up to 8 breaks...

Text:

...start in the same way that many classic systems were born: as in-house proprietary software. It was created at Support Plus, a home healthcare catalog selling to consumers, institutions and medical outlets that has enjoyed 25 percent compounded annual growth during the past five years.

DM/Edge has helped the...

...your network, it will help you apply DM/Edge to make the most of your system's investment.

B-TO-B FRIENDLY

There are few **catalog** management systems around that can accommodate business-to-business sales well. DM/Edge is one of them. And it does so without sacrificing the ease...

...assign a sales rep, and track open account balances and credit limits.

Accounts are maintained in DM/ Edge by company name and account number, and **include terms** and discounts, minimum order to qualify, cumulative lifetime orders/dollar sales and returns/refunds, current balance (with credits), and most recent and previous order data...

...any user to monitor sales activities without creating hard-coded reports, and to create tickler reports for customer follow-up.

In keeping with a **heavy-duty** b-to-b package, you can create elaborate customer profiles that include special dates to remember, names associated with the contact, notes about the customer...

...available.

"Promotions" are a key to configuring order-entry in the system, which can perform different functions for different types of promotions (space ads vs. **catalogs**, for instance, or phone and mail orders).

DM/Edge analyzes most **catalog** activity by "promotion," defined to include media type, name of medium, key code and offer variables. With each promotion you can set up different order...

...by, bill-to, or ship-to names. You can do cross-selling and upselling by customer type or promotion.

Inventory is managed on three levels: "**Catalog** Items," which organize SKUs by size, color and style; "SKUs," which describe the actual items; and "Locations," which refer to pick locations, warehouses, quantities and...per SKU in the same warehouse, optimized bulk vs. prime pick stocking levels, last cost/weighted-average cost, assembly by bill-of-materials, prices at **catalog** level/SKU level/ single-bin level, bin list, discount eligibility flag, prices (up to eight breaks)/discounts/shipping charges based on quantity/item/customer type/promotion/product sizes, codes for category/class/sub-class/**tax**

class, component assembly, serialized inventory, **purchase order** and receiving routines, cross-sell/upsell by customer type or promotion, purchasing lead times, shelf-life, shipping charge exemption flag, charges for personalization/assembly/gift...

...code analysis report), operator productivity, demographic sampling and contrast reports.

Ernest H. Schell is president of The Communications Center, Jenkintown, PA, executive director of the **Catalog** Systems Management Network, and a consultant for **catalog** software selection, operations audits and database implementation.

Descriptors:
...Catalogs;

Classification Codes:

Dialog eLink: [USPTO Full Text Retrieval Options](#)

12/6/K/27 (Item 13 from file: 15)

DIALOG(R)File 15: ABI/Inform(R)

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00725856 93-75077

****USE FORMAT 7 OR 9 FOR FULL TEXT****

Network Dyads in Entrepreneurial Settings: A Study of the Governance of Exchange Relationships

Mar 1992 Length: 29 Pages

Word Count: 12371

Text:

...Two were manufacturing organizations (HiTech Computer and Support Products); one was a distribution company (Telephone Distributor); and the last was a combination of retail and **catalog** sales (Clothing Company). Each firm was operating in relatively turbulent competitive arenas. The telephone industry was experiencing deregulation, and Telephone Distributor and its partnered firm were attempting to carve out new market niches. Although the clothing company was in a mature market segment, it was actively growing its **catalog** business, an area of retailing that was experiencing very rapid growth in the mid-1980s. The computer hardware company was in a highly competitive environment...identified in Figure 1

with the names: Telephone Manufacturer (manufacturer of telephone equipment for small to medium-sized businesses), Clothing Manufacturer (an apparel manufacturer), Clothing **Catalog** (a printing company), HiTech Boards (designer and manufacturer of complex printed circuit boards), HiTech Assembly (assembler, only, of printed circuit boards), Support Breakers (manufacturer of...itself. The decisions to enter the tight alliances that were studied were not based solely on short-term economic criteria but, rather, on multiple criteria, including long-term learning opportunities (e.g., what the entrepreneurial firm could gain from the expertise and innovative capacities of key suppliers and customers), ease of communications and...taken the philosophy that says we are better off developing close relationships, personal relationships, with vendors.

Another example was provided by a manager at Clothing **Catalog**, who described Clothing Company's president's requests for meetings to improve the way the two companies worked together. He would call a meeting for...

...other firms with which he worked! only Clothing Company really listens.

The president of Clothing Manufacturer described the trial period:

[the founder of the entrepreneurial **catalog** company! kept pushing us [saying!, if you do this, I'll do that. We did, and he did. He would suggest that if we would...IMPROVEMENTS. A more established company used one of the small high-growth firms as a source of technical and procedural innovation. A manager at Clothing **Catalog**, a larger and more bureaucratic partner firm, illustrated this dynamic:

We are constantly changing things to try to improve the way we do business together...Assembly described his firm's alliance agreement and compared it to other outside economic transactions. He started with this summary of typical external transactions:

A **purchase order**; that's it. Take X [a nationally well-known computer company was named here!, I have a contract that thick, and Y [another well-known...Etzioni, Amitai

1988 *The Moral Dimension*. New York: Free Press.
Fama, Eugene F., and Michael C. Jensen

1983 "Separation of ownership and control." *Journal of Law and Economics*, 26: 327--349.

Granovetter, Mark

1973 "The strength of weak ties." American Journal of Sociology. 78: 1360--1380.

1985 "Economic action and social...

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12/6,K/28 (Item 14 from file: 15)

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00639830 92-54770

****USE FORMAT 7 OR 9 FOR FULL TEXT****

Small-Business Accounting

Nov 1992 **Length:** 3 Pages

Word Count: 2854

Text:

...small business that has a staff accountant, so you have to periodically don a bean-counting cap and wrestle with accounts payable and receivable, estimated **tax** payments, payroll, and other mundanities. To many people, the only thing worse than practicing accounting is learning about accounting, and the result is usually informal, erratic billing practices and shoddy records. Besides being a nightmare at **tax** time, shoe-box-based accounting systems can hurt profits. If a contractor sends out bills only when the shoe box overflows, he's losing money...

...double-entry bookkeeping system puts the accounting equation to work.

The cardinal rule of double-entry accounting is the accountant's variation of Newton's **law**: for every debit there is an equal and corresponding credit. If you earn \$1000, your assets increase by \$1000 and your equity increases by \$1000...Accrual-basis accounting results in more accurate income figures for a given time period. (Certain types of businesses, including publicly held corporations, are required by **law** to use accrual-basis accounting.)

During each accounting period, you record information about each transaction in a general journal, a chronological listing of each transaction...

...bills such as monthly rent and loan payments. When setting up the

accounting program, you enter a list of all the vendors you purchase from, including their addresses, credit **terms**, and your preferred shipping method. All programs can print checks on preprinted check stock; most programs include **catalogs** for checks and other forms. Some programs can also generate **purchase orders**: just specify the vendor and what you want to order, and the program prints a P.O.--and also posts its total to your general...

...their totals to the A/R ledger. When the program posts the invoice, it also makes entries in other relevant journals, recording, for example, sales **tax** payable and outbound freight costs in the A/P journal. All the while, the program is following the rule of double-entry accounting, making a...packages provide payroll-management features. During setup, you enter the name and address of each employee, as well as wage information and deduction data for **taxes**, savings plans, insurance, and the like. At each pay period, the program prints payroll checks and updates the general ledger. Programs that handle payroll are often updated annually to reflect the latest **tax laws**. In many programs, you can also associate some or all of an employee's wages with a particular project. You can then create reports that...

...of a program has a corresponding array of reports. You can print financial statements such as balance sheets and earning reports. You can print employee **tax** documents such as W-2 forms and year-to-date earnings summaries. You can print aging reports that categorize accounts receivable according to date-find...
...accounting program and retail-sales system. Used with the firm's Classic POS system, ShopKeeper really is a cash register: Classic POS includes a heavy-duty metal cash drawer and receipt printer; a bar-code scanner is optional. Add a Macintosh Classic or Classic II, and you're ready to ring...

...with your business. Then, you may want to talk with your accountant or a consultant to settle on a specific program. If your accountant or **tax** preparer is familiar with a given program, that may influence your choice. You'll be able to simplify life in early April by supplying a
...

...and running means more than copying it to your hard drive. But then, no other category of software so directly affects your business. And only

tax-preparation software has the same ability to get you in trouble with the government. Accounting software isn't for the impatient or the disorganized. It...

12/6/K/29 (Item 1 from file: 16)

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05609309 **Supplier Number: 48487569 (USE FORMAT 7 FOR FULLTEXT)**

Sterling ForgesAhead With EDI

May 18, 1998

Word Count: 824

Supplier Number: (USE FORMAT 7 FOR FULLTEXT)

Text:

...a year makes a big difference. Fourteen months ago the EDI software developer was producing some of the first servers enabling companies to exchange EDI **purchase orders** and invoices across corporate intranets. Now it is forging ahead with extensions that join PC applications with Internet EDI.

That means product **catalogs**, call-center applications and directories can fit in an EDI business-trading environment. Yet Sterling

and others still face an uphill climb.

Questions about whether...

...processes.

"We're moving data of any kind between parties in a completely automated fashion, whether they're spreadsheets, price lists, bar-code information or **catalogs**," said Roxanne Stanfield, Internet product manager for Sterling's Gentran product line. "Ultimately, WebSuite gives corporations the tools for centralized IT management."

Analysts said Sterling...

...Sterling's WebSuite, Stanfield said.

For some companies, the new Internet EDI tools are spurring wholesale changes in business processes. For 10 years, Vipar Heavy **Duty** Inc. has helped facilitate paper-based trading among its 75 independent truck distributor customers-a collective that accounts for \$1 billion in annual trades. It...

...50,000, lets developers create applications using any ActiveX development tool. As such, it is limited in support of JavaScript.

EDI vendors still face long-term challenges, including pressure on their proprietary value-added networks and Extensible Markup Language commerce products that are expected to come out in the next several months, analysts...

19980518

12/6,K/30 (Item 1 from file: 148)

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0026326385 **Supplier Number:** 217191642 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Stocks That Stand Out For Jan. 22nd, 2010 Are Jan 22, 2010 - SymPowerco Corporation (PINKSHEETS: SYMW), Jan 22, 2010 - Gen2Media Corporation (OTC Bulletin Board: GTWO), Jan 22, 2010 - China Crescent Enterprises, Inc. (OTC Bulletin Board: CCTR), Jan 21, 2010 - Zevotek, Inc., (OTC Bulletin Board: ZVTK), Jan 21, 2010 - Effective today, Americas Energy Company (OTC Bulletin Board: AENY).

Jan 22 , 2010

Word Count: 3536 **Line Count:** 00304

...Town Hall presentation, China Crescent CEO Paul K. Danner provides a review of the Company's 2009 performance and successful launch of its Outsourcing Services including two substantial, long-term contracts. Additionally, the presentation provides an overview of recently announced plans to expand into new business lines, the acquisition of a China Radio Technology Ltd...

...is updated with new airtimes when cable channels announce them to the Company. While you're on the website, check out our easy to use shopping cart and buy Ionic Bulbs for yourself, family and friends." About the Company: Zevotek, Inc. plans to market and sell a range of innovative personal and...

...use compact fluorescent light bulb (CFL).The Company sells the Ionic Bulb through TV infomercials and the Internet and plans to market Ionic Bulbs through catalogs, magazines and major U.S. retail and specialty stores. The Company's new 2 minute Ionic Bulb TV ad is designed to air on national...

...be relied upon as of any subsequent date. Zevotek, Inc. cautions readers

not to place undue reliance on such statements. Unless otherwise required by applicable law, Zevotek, Inc. does not undertake, and Zevotek, Inc. specifically disclaims any obligation to update any forward-looking statements to reflect occurrences, developments, unanticipated events or...

20100122

12/6,K/31 (Item 2 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
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0026263155 **Supplier Number:** 215949294 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Don't Miss Out On The Hottest Newsletter!! Hear It Here First!!
CDIV,ECOB,AEMD,BGNN,APDN,ACTC.

Jan 7, 2010

Word Count: 3774 **Line Count:** 00337

...services, and exploring recently discovered opportunities to address exosomes in disease conditions beyond cancer. Scientific publications reveal that exosomes may also have implications in inflammatory **conditions including** Sepsis, bacterial infections **including** Tuberculosis (TB), autoimmune **conditions** such as Rheumatoid Arthritis, and neurological and neurodegenerative diseases such as Alzheimer's disease. Regardless, the formation of ESI allows us to leverage value from...

...NextPharma Technologies ([Click Here for Website](#)) to establish manufacturing of our Hemopurifier(R) under good manufacturing practice (GMP) requirements set forth in quality system (QS) **regulations** for medical device commercialization. As the result of a lengthy and dedicated effort, we established our GMP manufacturing processes and initiated our first Hemopurifier(R...

...with over 180 locations. We anticipate even more growth in our future and have many new and exciting programs on the way, including an **Electronic Catalog.**

(OTCBB: APDN - Applied DNA Sciences, Inc.)
LATEST NEWS!!

Applied DNA Sciences Signs Global Luxury Brand Agreement
Will Supply DNA Markers and Authentication for Luxury Brands...

...s DNA Authentication Marks will be used to mark unique luxury goods and
link them to specific owners. On signing of the Agreement, APDN
received
purchase orders for multiple DNA Authentication Marks. These
purchase orders have already been filled and shipped back to
the brand-owner.

"Premier brands are using DNA both to protect their brand and to
offer customized..."

20100107

12/6/K/32 (Item 3 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
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**12195856 Supplier Number: 62498235 (USE FORMAT 7 OR 9 FOR FULL TEXT)
PRIVACY 2000 IN WEB WE TRUST?(News Briefs)**

June , 2000

Word Count: 6709 Line Count: 00523

...in Commerce

CONSUMER PROFILING isn't new. For years, mail-order firms have been tracking the products you buy so that they can send you **catalogs** specific to your interests. Shopping club cards allow supermarket chains to keep detailed records of the groceries you purchase. And special-interest magazines, like the...variety of personally identifying information.

For example, when you use a search engine like AltaVista, the URL for the results page contains a text string **including the terms** you searched for. Depending on how the Web site's search engine works, a URL could contain your name or e-mail address, too, as...

...If a company fails to observe its policy, it can be sued under the federal Consumer Fraud and Abuse Act, as well as various common **laws** and state and federal consumer protection statutes.

But policy breaches may be more common than most people realize. A study of 21 health advice sites...a (legal) remedy. Right now we don't have that."

Although several states have already enacted their own privacy statutes, there is no comprehensive federal **law** governing personal privacy. But the situation may change this year. Congress is currently debating a dozen bills designed to regulate different types of personal data...

...some ways is at the local or state level," says Tom Maddox, editor of PrivacyPlace.com, a Berkeley, California, site specializing in privacy issues. "Federal laws tend to be big, fat, unwieldy (ldots) sledgehammers swatting at gnats. They usually miss the gnat and hit the rest of us."

Technology to the...World. Tom Spring is senior reporter for PCWorld.com.

E-COMMERCE'S DIRTY LITTLE SECRET
IN LESS TIME than it takes to fill an online shopping cart, Eran Reshef types a command into the URL of a large Web retailer and gains access to the site's source code. A few more...

...sleep at night knowing they've got Amy's blood on their hands," Remsburg says.

But Docusearch.com, which declined comment, didn't break any laws.

The Business of Net Snooping
CULLING DATA from public and private sources is not only legal but part of a flourishing industry. There's a...

20000601

12/6/K/33 (Item 4 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
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11271507 **Supplier Number: 55471542 (USE FORMAT 7 OR 9 FOR FULL TEXT)**
Information management.(1999 Buyers Guide)(Buyers Guide)

July , 1999

Word Count: 15886 Line Count: 01419

...offers The Learning Center: outstanding continuing education to keep long-term care and skilled nursing facility staff on the cutting edge of current information and regulations. Call (515) 892-4486 for a list of current course offerings.

EDI Long Term Care Systems
Jackson, NJ
Contact: Ellen Leolyn Dutton
Ph. 732-833...obligation. Our friendly Customer Support
Representatives can answer any questions you might have regarding our extensive line of charting products. Call today for a free catalog.

Health Care Software, Inc. (HCS)
Farmingdale, NJ
Contact: Al Barwick
Ph. 800-524-1038 Fax 732-938-5380
Email: abarwick@hcsinteractant
Web: www.hcsinteractant.com...offers The Learning Center: outstanding

continuing education to keep long-term care and skilled nursing facility staff on the cutting edge of current information and **regulations**. Call (515) 892-4486 for a list of current course offerings.

EDI Long Term Care Systems
Jackson, NJ
Contact: Ellen Leolyn Dutton
Ph. 732-833...offers The Learning Center: outstanding continuing education to keep long-term care and skilled nursing facility staff on the cutting edge of current information and **regulations**. Call (515) 892-4486 for a list of current course offerings.

Diagnostic Ultrasound Corp.
Redmond, WA
EDI Long Term ...Graphics, Daily Charting/Forms Tool, RUGs, MDS 2.0, Care Planning, Interdisciplinary Notes, Staff Scheduling, Review Scheduling, Order Entry, Rehabilitation, Pharmacy, In-Service Attendance, Dietary, **Purchase Orders**, Inventory, Fixed Assets, Insurance Correspondence Tracking, Vital Signs Tracking, Accident/Incident Reporting, Preadmission Assessment Costing Tool, Executive Information System, Point-of-Sale System and more...

...offers The Learning Center: outstanding continuing education to keep long-term care and skilled nursing facility staff on the cutting edge of current information and **regulations**. Call (515) 892-4486 for a list of current course offerings.

Eatonform, Inc.: Dayton, OH
Contact: S. Doyle Key
Ph. 937-298-3406 Fax 937...to initiate a work request. As with all MPulse Maintenance Software, Gold supports multiple asset types, key and lock control management, and linked inventory and **purchase requisitions**. Users easily create and schedule preventive maintenance, generate work orders, and report on maintenance history. Current MPulse Maintenance Software users can upgrade to MPulse Gold seamlessly.

LONG-TERM CARE SOFTWARE
EDI LTC Systems offers user-friendly software for long-term care, including clinical and financial applications. Our software handles Inquiry and Sales Tracking, Preadmissions Screening, Admissions, Physicians' Orders, Assessments, Treatment, Care Plan, Progress Notes, MDS2, RUGs-III...

19990701

12/6/K/34 (Item 5 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
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10225529 **Supplier Number:** 20620326 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Sterling ForgesAhead With EDI.(Sterling Commerce Inc's Gentran WebSuite 4.0)(Product Announcement)

May 18, 1998

Word Count: 890 **Line Count:** 00076

Abstract: ...uses Microsoft's ActiveX technology to build electronic forms that simplify the EDI process. With this software, users can produce various electronic documents, ranging from **purchase orders** and directories to product **catalogues** and call center applications. In fact, the company emphasizes that any type of data, from spreadsheets to barcode and price list information, can be exchanged...

Abstract:

Text:

...a year makes a big difference. Fourteen months ago the EDI software developer was producing some of the first servers enabling companies to exchange EDI **purchase orders** and invoices across corporate intranets. Now it is forging ahead with extensions that join PC applications with Internet EDI.

That means product **catalogs**, call-center applications and directories can fit in an EDI business-trading environment. Yet Sterling and others still face an uphill climb.

Questions about whether...

...processes.

"We're moving data of any kind between parties in a completely automated fashion, whether they're spreadsheets, price lists, bar-code information or **catalogs**," said Roxanne Stanfield, Internet product manager for Sterling's Gentran product line. "Ultimately, WebSuite gives corporations the tools for centralized IT management."

Analysts said Sterling...

...Sterling's WebSuite, Stanfield said.

For some companies, the new Internet EDI tools are spurring wholesale changes in business processes. For 10 years, Vipar Heavy Duty Inc. has helped facilitate paper-based trading among its 75 independent truck distributor customers—a collective that accounts for \$1 billion in annual trades. It...

...50,000, lets developers create applications using any ActiveX development tool. As such, it is limited in support of JavaScript.

EDI vendors still face long-term challenges, including pressure on their proprietary value-added networks and Extensible Markup

Language commerce products that are expected to come out in the next several months, analysts...

19980518

12/6,K/35 (Item 6 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

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09828608 **Supplier Number:** 17415577 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Total Library Computerization, Version 2: a DOS-based program from On Point Inc., for managing small to midsized libraries. (Software Review)(Evaluation)

Fall, 1995

Word Count: 10940 **Line Count:** 00920

Text:

...user-interface and other products offered by On Point, Inc. Each of the major modules of TLC is described in detail, including the on-line **catalog**, circulatory serials control, acquisitions, authorities control, and interlibrary loan.

...are being contemplated, so the potential customer should consult with On

Point concerning its current policy.

User Profile

On Point's current customers include hospitals, law firms, corporate libraries, and trade associations. The largest installation using

TLC's **catalog** contains 20,000 volumes. Apart from a sample list of users, On Point declined to provide further information about the number of registered users it...

...input workstation, separate modules are available for \$100 per module plus \$100 for the engine. Additional read-only workstations (for example, on-line public access **catalog** (OPAC) terminals) are available for the network version at \$200 per station. In addition to the basic modules provided in the complete package, described below work well for on-line **catalog** search stations. TLC's default printer setup will print to an Epson, IBM printers, and most laser printers. A program is supplied for entering the...

...a local area network, this must be installed as a prerequisite to using the multiuser version of TLC.

Overview/Functional Description	
	Modules Available
On-line catalog	Yes
Cataloging	Yes
Circulation	Yes
Acquisitions	Yes
Serials control	Yes
Interlibrary loan	Yes
Memo	Yes
Reports/inventory	No

This product description is based on the...

...functional demonstration version of the TLC software, with the exceptions of the barcoded version of the circulation module and the "two-pagee" version of the **catalog**, and the complete user documentation. The reader should be aware that there are differences between the barcoded version, the two-pager version, and the version...

...and customized software, so the descriptions given here may or may not correspond to a given installation.

TLC includes the basic library management modules: (1) **Catalog**, the cataloging module, (2) **Borrow**, the circulation module, (3) **Serials**, the serials control module, and (4) **Orders**, the acquisitions module. In addition to these, TLC...

...function on its own, but all are fully integrated when present. The OPAC is actually a minimenu with a subset of features contained in the **Catalog** module, as described below in the section dealing with the OPAC.

In addition to these modules, four programs, which are integrated into the full menu...

...a given module. The shortcut key options are illustrated in Figure 2. Pressing "c" from this screen, for example, will take the user to the **Catalog** Menu. However, pressing from that menu will not bring the user back to the shortcut screen. Instead, it will return to TLC's opening...needs, but larger installations should give this serious consideration. On Point indicates that they can provide password protection, should the purchaser request it.

On-Line Catalog	
Search Capabilities	
Title	Yes
Author	Yes
Subject	Yes
Call number	Yes
Keyword	Yes
Boolean operators	
And	Yes
Not	Yes

Or	Yes
Controlled truncation	Yes
Stop...	

...about the library's collection successfully. This is a characteristic particularly well suited to its primary market of smaller libraries such as those found in law offices and hospitals. This initial ease of use is enhanced by flexibility in that the OPAC is a minimenu offering a subset of the capabilities...are mentioned below, are available when working with

TLC's full Main Menu.

Search Methods

TLC's OPAC provides several initial options for searching the catalog. As shown in Figure 3, the patron is presented with options to search the entire catalog or to restrict the search to the author, title, or keyword fields. To perform a straightforward search by the author's name, for example, the...

...and search full text documents such as memoranda, but it is also important for those installations that will store abstract information for items in the catalog.

A few differences between the sample OPAC and TLC's full menu for searching the catalog deserve to be mentioned. Most of the command line options for constructing advanced searches are available from the OPAC, although a few are available only from the full menu. For example,

from the full menu a user can run a search that can count the number of books in the catalog or list the total cost of all books in the catalog, using "@BOOK {TALLY}" and "@BOOK {TOTAL}, respectively.

Another difference between the two is how the records are displayed.

For

example, from the full menu a...must take care to restrict global searches to locate only those records needed.

Alternate displays are available from various menu items. For example, from the Catalog module, Menu2, there is an option that displays title, author, date, call number, and location. Under this same module, Menu3, there is an option to...

...item. Neither of these was an option on the sample OPAC provided to me, although I have indicated that these features are available in the Catalog check-box. The reader needs to remember that these should be discussed with On Point at the print of purchase.

	Circulation	Circulation Features	
No	Charge	Yes...file	
	Import of MARC records	Yes	
	Export of MARC records	No	
	Cross-references	No	

Dynamic indexing	Yes
Immediate changes in OPAC	Yes

TLC's **Catalog** module provides features relating to creating a collection, adding and deleting records, and editing existing records.

The features available for this module are displayed in the **Catalog** Update Menu, shown in Figure 7, accessed by first selecting **Catalog** from TLC's Main Menu, then selecting Update for the **Catalog** Update Program Menu.

Database Structure and Organization
The record structure used by TLC addresses most of the needs of small libraries. As each record is...the date the record is created or modified.

The underlying DBMS of TLC provides for searching and retrieval of newly created records. Changes in the **catalog** are immediately available for searching and display from other workstations sharing the database, including the OPACs. Searching options from the **Catalog** Menu are similar to those described above relation to the OPAC; the enhanced searching options available from this menu are also mentioned there.

TLC's...
...comma-delimited files for use with other non-MARC databases.
Record Creation and Editing
To add a record to the database, the user opens the **Catalog** Update Menu and selects the Add option. The user is then presented with the Add Menu, as shown in Figure 9. Next, the user decides...

...user to spend time with the manual or the on-line help to decipher the field names.

Editing existing records is also selected from the **Catalog** Update Menu. The user selects :EDIT/REC for the menu and is then prompted for a search criterion. The program will locate all items matching the criterion in the **catalog** and display the full record for each, beginning with the first matching record. The user pages through the matching items by pressing . As the...records, in the event the library has multiple copies of a given item, is facilitated by the Add/Copy option from the Add Menu for **Catalog** Items. With this option, the user is prompted for the title of the item and any other identifying criteria. Once this is entered, the matching...

...database. First, there is a Subject Headings Authority File. This program is accessed from the shortcut key "J" or from the Add Menu of the **Catalog** module. The program allows the user to define standard subject headings, including a narrower **term**, broader terms, and related terms entry for each specific heading.

The second tool is the Author List Menu, accessed from the third submenu of the **Catalog** program. This program provides a procedure to generate an alphabetical listing of all authors in the database. Again, this could be used to introduce consistency in the database with respect to

authors' names.

Serials Control	Serials Control	Features
Display of issues available in catalog		Yes
Generation of order for or cancel of subscriptions		Yes
Database of vendor information		Yes
Serial holdings in USMARC format		No
Provisional cataloging		Yes
Built...		

...and dial-in claiming that will work with your communications software.

Serials Record Structure
The structure for serials records necessarily differs from that of the **catalog** database, because items are tracked that are not needed for the OPAC, circulation, or cataloging. The serials database is a separate database in TLC. The...

...library filer.

In addition to the data for the serial itself, TLC maintains databases with information relating to vendors and binderies.

Serials Records and the **Catalog**
To have serials records displayed in the **catalog**, it is necessary to move information from the serials record to the **catalog**. This is facilitated from the Serials module with the user of the Copycat program, which is found on the Serials Update Menu. When selected, the...

...to identify the serials record. Once this is done, the user can elect to enter the subscription's tide for a single entry in the **catalog** or can enter the item using the uncataloged template to enter information about a single issue. Entering the latter will provide information in the **catalog** about which issues of the serial the library actually holds. In either case, the program generates the selected template with appropriate information already filled in...

...date, and so forth. The only data the user needs to enter are for those fields not in common between the serials database and the **catalog** database, such as author, if needed in the **catalog**. This is a very useful feature and greatly enhances the value of the cataloging module and OPAC.

Acquisitions Acquisitions Features
Display of on-order status in **catalog** Yes
Automated selection lists No
Controlled approval of requests Yes
Generation of orders Yes
Database of vendor information Yes
Provisional cataloging Yes
Electronic ordering of...
...tracking accounting information include fields for an account number

(for individual client accounts), the library account number, the date when the order is placed, the **purchase order** number, the date the item is received, the date the final payment is made, and the check number used for payment. There is also a...

...identify the library, and the name of a contact person, and a note field for recording miscellaneous information about the vendor.

Orders Records and the **Catalog**

As with the Serials module, items that are entered in the Orders module can be copied to the **catalog**. This is done with the Copycat option, found on the Orders Update Program Menu. When this option is selected, the user is prompted to choose a template that matches the category of the ordered item from those available in the **catalog**. Information already in the order record is automatically transferred to the template. The user only needs to enter manually the data in those fields not shared between the orders record and the **catalog** record.

It might be useful for the library to copy an order record to the **catalog** with a notation, perhaps in the location field, to indicate that it is on order. This way, this information could be available for patrons from...

...used by others in acquisitions to minimize the possibility of duplication. If this procedure were followed, the record would need to be updated in the **catalog** once the item arrived.

A similar record transfer program, called Copyser, exists for copying an orders record to the serials database. Again, the user would...

...for a given date as well as for a period between any two dates. Reports can also be generated sorted by requester, date placed, tide, **purchase order** number, and author.

Reports related to tracking the process include several that display or print orders that have been entered. Several others are provided for... of the traditional areas required for library automation, providing superior features in some. Among its strengths are its superior searching capabilities in its on-line **catalog**, its good coverage of the acquisitions and serials control process, its ILL module, and its modular design. The ability to be customized to suit the...

...as budgets allow. A second and potentially larger market is composed of those small libraries that need features provided by only certain modules -- the Serials, **Catalog**, and ILL modules, for example -- rather than a complete automation solution. I look forward to the refinements that will

come as this product develops.
Reference...

19950922

12/6,K/36 (Item 7 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
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08899044 **Supplier Number:** 18562140
Making the back-of-the-house state of the art.(Company Profile: Applebee's International Inc.)

August 5, 1996

Word Count: 4468 **Line Count:** 00355

...the most important tools in the kitchen. All foodstuffs are date stamped when they come in and whenever they are processed.

One of the key **duties** of the kitchen manager is to conduct the "line check" before each meal period. If the KM is not available, someone of equal or higher form lists the ingredient name, descriptions of how the product should appear feel or smell if it is in optimum **condition** and it **includes** a reminder of the item's prescribed shelf life.

A recent line check included entries for approximately 120 items.
"Every shift has a back-of..."

...fairly loose dress code for workers in the back-of-the-house.
"All that's required is an Applebee's hat and shirt from the **catalog**. There is a variety of approved shirts they can wear, but typically they will choose T's or polos," a spokesman for the chain says...
from a single manufacturer. Weber's crew realized savings by recognizing the potential for lower freight charges and greater volume discounts if the distributor combined **purchase orders** from three warehouses that previously ordered the products independently.

In a move to stabilize produce prices, Applebee's International last year began contracting with growers...s food purchases were about \$400 million in fiscal 1995, chain officials say.

The Applebee's purchasing department, in the course of carrying out its **duties**, deals with more than 1,000 vendors whose products are routed through 28 domestic distribution centers and four foreign centers.

In the end, Lumpkin says...

...International much of the responsibility for building and maintaining bar sales falls on the new manager of beverage development, R. David Brown.

Brown says his **duties** include "development, implementation and monitoring of products and bar practices designed to increase sales and trial of Applebee's beverage products." But apart from those...

...the glass are 6-ounce and 7-ounce pours; and spirits are measured in 1-ounce-to-2-ounce shots, depending on the drink, state **law** or local customs. Wine is available by the half and whole carafe.

The chain's beer offerings typically include the three major brands, Budweiser, Coors...

19960805

12/6/K/37 (Item 8 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

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08661169 **Supplier Number:** 18126169 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Computer software offers something for everyone.

March 18, 1996

Word Count: 1416 **Line Count:** 00134

...service business.

The company claims the software is designed for the daily operations of a service company, "from the time a call comes in through **tax** reporting." Program highlights include customer history, call log, scheduling and dispatch, and accounts receivable.

Coastal Computer Corp., Fort Myers, Fla., displayed the "Coastal Data Management..."

...a variety of micro- and mini-computer systems.

Program features include service and dispatch, service agreements, preventive maintenance, accounts receivable, inventory control, job management, and **purchase orders**. Other modules are available.

Vertical Market Software, Pensacola, Fla., showed both its "Contractor Information System" and "Services Information System."

The former program includes job costing, estimating, general ledger, **purchase orders**, service dispatching, bill of materials, plus other features. The latter includes service management, accounts receivable, inventory control, pricing interface, order entry, and financial capabilities.

Estimating...

...This program's capabilities include fluid flow and heat transfer,

incompressible and subsonic compressible flow, laminar and turbulent flow, and a variety of thermal boundary **conditions**.

Applications **include** building heating and ventilation flows, heat exchangers, and internal flows in ducts and diffusers.

Computair, Toddington, Bedfordshire, England, highlighted several air movement design software products...with more than 45,000 listings of hvacr and sheet metal parts used in residential and light commercial repair; price directory, including hvacr items and **catalog** numbers; and the price guide, which lists commonly used hvacr items needed for light service and repair jobs.

Wrightsoft, Lexington, Mass., featured the new "Right..."

19960318

12/6/K/38 (Item 9 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

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07583362 **Supplier Number:** 16469398 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Lending to the apparel industry.

Nov , 1994

Word Count: 3804 **Line Count:** 00308

...seasonal peak periods. Revolvers often provide subfacilities for trade letters of credit. Short-term lines and revolvers may be secured by trade accounts receivable and **imported** inventory.

Bank **term** loans are used somewhat less often by apparel companies than by other firms. Very frequently, however, these types of loans are important financing tools for...to recognize that these percentages are misleading since only textile products constructed of both U.S.-made yarn and fabric will be eligible for favorable **tariffs** and quotas.

The increasing popularity of quick response or just-in-time ordering will work to the detriment of Asian exporters. These exporters will be...

...or teams is also a rapidly growing global industry.

Country Origin of Goods. Under federal 807 and 807(a) programs, selected Caribbean countries need pay **tariffs** on only the value added to apparel made from U.S. fiber and fabric. Sewing and stitching operations, in particular, are proliferating as a result...

...the terms and costs of letters of credit, and for certain gray market goods (items with dubious origins), compliance with U.S. copyright and

patent laws on the related garments.

Chapter 11 Laws and Greater Attractiveness of Bankruptcies. The advent of Chapter 11 ...trend toward global fashion tastes. American blue jeans, T-shirts, and sporting goods apparel are examples of the U.S. contribution to a new world (purchase) order.

As many apparel firms move overseas, they tend to seek joint venture

partners who can line up sovereign manufacturers and suppliers and can manage relations with local governments. These arrangements circumvent import duties and limit investment into lands where appreciation for property rights is still developing. Corporate investors must also be flexible about payment terms. In Eastern Europe...

...and to cut systemic inventories. These apparent gains must be weighed against the increased likelihood of stock shortages.

5. Cannibalization of Retail Sales by Television, Catalogs, and Outlet Malls. In the mid-1980s, several videotext ventures were started, the most widely known was an alliance of IBM, Sears, and CBS. All...

...from their homes. Moreover, Macy's and several other large retailers have added cable stations of their own to market apparel and other goods.

Apparel catalogs from such firms as Land's End and L.L. Bean have been taking a bigger bite of apparel sales in recent years. And apparel...

...6. Offshore Sewing Operations. As mentioned earlier, savings in labor costs initially led apparel merchants to buy from the Far East. But favorable U.S. tax treatment in Mexico and the Caribbean is expected to boost the output of that region and its employment and will further extend its exports into...of an integrated production network and some of the strongest brand names in the world. Or it can hold fast to its domestic markets through duties and import quotas, for as long as they last, and watch the world pass it by altogether. And that is the apparel industry's chief...

19941100

12/6/K/39 (Item 10 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

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07314869 **Supplier Number:** 14698414 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Apparel and fabricated textile products. (Industry Overview)

Annual, 1994

Word Count: 4545 **Line Count:** 00380

Author Abstract: ...trend. Apparel exports gained 20 percent, a slight slowdown from recent years. Imports grew 9 percent, half the rate of the previous year. In value **terms**, the **import** increase overwhelmed the export expansion, resulting in a higher trade deficit of about \$30 billion in 1993.

Text:

...Machinery), and 39 (Retailing).

Many of the data in this chapter have been revised. In particular, the foreign trade concordance between the SIC and the **tariff** schedules was revised. This caused the trade series presented in this chapter to be significantly different from that presented last year. For example, knit wearing...in the past few years. Retailers use point-of-sale systems, bar coding, automated inventory management systems, and electronic data interchange for accepting and confirming **purchase orders**. These partnerships call for a high degree of cooperation. Information is shared on production schedules and forecasting. One study shows that, among large companies, order...

...to handle many different operations as needed. Companies that have made a commitment to modular manufacturing have experienced dramatic reductions

in order cycle times.

Government **regulations**, the high cost of workers' compensation, and rising health care costs have prompted apparel companies to search for ergonomically friendly equipment. New technology has produced

...
...that are shipped to other countries for assembly and eventual return to the U.S. market under the HTSUS 9802 (previously 807) program receive preferential **duty** treatment. (The importer pays **duty** only on the value added abroad under this program.)

U.S. manufacturers have taken advantage of their reputation for high quality, U.S. Government-sponsored...

...customers are looking for the American look and ease of care and wearing. In addition to direct exports, greater numbers of U.S. retailers and **catalog** houses have established sales outlets in other countries to sell U.S. apparel products. Men's outerwear and home furnishings remain the largest export categories...Potential future changes in the international trade of apparel and fabricated textile products are dependent on the successful completion of the current General Agreement on **Tariffs** and Trade (GATT) negotiations - the Uruguay Round, which

encompasses a gradual phaseout of the MFA and the return of textile and apparel trade to regular Industrial Reports, SIC 23. Bureau of the Census,

Industry Division, U.S. Department of Commerce, Washington, DC 20233.

Foreign **Regulations** Affecting U.S. Textile and Apparel Exports, International Trade Administration, U.S. Department of Commerce, Washington, DC 20230. Telephone: (202) 482-5153.

Monthly Labor Review...

19940100

12/6,K/40 (Item 11 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

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06722783 **Supplier Number:** 14480385 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Managing a powder-coating shop: how an Oregon finisher takes the guessing out of pricing.

Sept, 1993

Word Count: 2821 **Line Count:** 00221

...the schedule of pricing. Tied to the same job-costing and job-processing system is the client-information database. This maintains details about each client, including billing information, **terms** and credit limits. It gives immediate feedback when a client begins to slip behind on payment.

This is the other side of the same profit...simply by dividing the hours worked each month by the monthly average bills. Labor must include direct pay to employees and the indirect expense of **taxes** and benefits. Indirect expenses are figured by dividing the annual or quarterly payroll **taxes** and benefits by the hours worked in a year or quarter and allocating this hourly cost to the different labor categories in addition to direct...

...half-page summary improves the odds of getting the price right.

Once a job is bid and accepted, the part is entered into the system "**catalog**." If the client has other similar jobs already recorded, the operator merely brings up the list of jobs for that client, selects the one most...order is printed, a master job sheet is produced that summarizes the various parts to be coated on the order. It gives prices, promised date, **purchase order**, shipping and other administrative information. The master work order stays on Ross' wall rack until all travelers come back from the shipping department.

A traveler...

...the parts that are completed.

Using incentive pay based on improving the job time is one way Northwest Industrial Coatings stays competitive with rising employment **taxes** and labor costs. "Employees respond to incentive pay, but even without it, they like to have a goal to beat. One derives personal satisfaction in..."

...for all accounts 3) adds finance charges 4) produces selected client mailing lists on pressure-sensitive labels or sheets of paper and 5) prints custom **catalogs** of client parts with or without pricing, which can be offered as a service to the client or can be used for weeding out duplications...

19930900

12/6,K/41 (Item 12 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

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06515874 **Supplier Number:** 14028204 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Paper and allied products. (Industry Overview)

Annual , 1993

Word Count: 20913 **Line Count:** 01726

...despite that nation's economic recession, is largely the result of the benefits from the U.S.-Canada Free Trade Agreement (FTA). All paper industry **tariffs** between the two nations are eliminated on January 1, 1993 under the FTA. Canadian imports to the United States were down by about 15 percent...

...years. Canadian-supplied newsprint now accounts for slightly more than 40 percent of U.S. newsprint consumption, compared with about 52 percent in 1991.

Recent **tariff** and nontariff concessions granted by Mexico upon its entry into the General Agreement on **Tariffs** and Trade (GATT) were instrumental in boosting U.S. paper industry sales to Mexico during 1991-92. With the conclusion of a North American Free...paper market to foreign suppliers. The agreement requires the Japanese Government to encourage Japanese paper distributors, converters, printers, and corporate users to increase their foreign **imports**; develop long-term buyer-supplier relationships with foreign producers; establish nondiscriminatory purchasing practices; and adopt specific purchasing guidelines that are applicable to both domestic and foreign suppliers. Under...

...ruled that five Western European nations, which were cited for dumping coated groundwood paper into the United States during 1987-90, would not be assessed **duties** to offset the price undercutting charged by the U.S. paper industry and so found in a preliminary U.S. Department of Commerce ruling earlier...

...worked to the benefit of the U.S. industry. Its products were highly cost-competitive in overseas markets, despite the various constraints placed by foreign **tariff** and nontariff barriers, and the increasing economic cohesion of the EC. With continuing fluctuations in domestic paper demand, an increasing number of U.S. paper...this writing.

EPA continued to develop revised effluent limitations and standards for the industry under the Clean Water Act, and has been evaluating whether additional **regulations** are required under that act and RCRA. The guidelines are expected to address dioxins and other substances, with potential implications for bleached pulp mills. EPA expects to have its proposed guidelines ready by early 1993 and promulgated by July 1995. Clean Air Act amendments, signed into **law** at the end of 1990, provide extensive changes to existing and new source requirements in ozone, carbon monoxide, and particulate matter, which could have a...

...are in compliance with all existing air standards, or that the benefits of a mill significantly outweigh the environmental and social costs of anti-pollution **regulations**. EPA was required by **law** to set maximum achievable control technology standards for 40 source categories by the end of 1992. Standards for the remaining source categories will be established...
...proposing their own timetables for reaching an intermediate state of recovery and recycling. New emphasis has been put on such measures as an EC packaging **tax** to ensure collection of waste and to fund recycling schemes. Strict conditions have been set to ensure that member states do not use these levies as future barriers to trade. Nevertheless, the imposition of an EC packaging **tax** plus the requirement that manufacturers, retailers, and distributors be responsible for recovering packaging waste, could add to U.S. paper export costs and reduce general...
was attributable to significantly higher demand by the commercial printing sector for various advertising and promotional end uses, including Sunday newspaper supplements, free-standing inserts, **catalogs**, and flyers. There also was an increase in advertising pages in many leading U.S. consumer magazines in 1992.

In 1992, the domestic newsprint sector...paper and paperboard

production.

As the single largest component of the MSW of most countries, scrap paper and board is traditionally the target of most **regulations** mandating separation of secondary materials. Not only has this created an excess of most grades of recovered paper and lower paper stock prices, but it...

...processing technologies to expand their secondary fiber consumption.

Other factors, including changing consumer attitudes and perceptions, the promulgation of new clean air and clean water **regulations**, and possible new international trade agreements and arrangements, will affect the consumption of paper and board through the forecast period. Many U.S.

paper and...carton industry had moderately higher sales in 1992 (estimated

at 3.2 percent in current dollars), and its estimated profits also improved. In 1991, after-**tax** profit margins for the industry averaged about 3.1 percent (5.2 percent before **taxes**), with about 58 percent of the boxmaking firms reporting some improvement over 1990. Despite the extended economic slowdown, the generally positive financial

performance of the...the dollar total), increased its shipments to the United States by about 60 percent in value and almost 75 percent in quantity. Lower U.S. **tariffs** implemented under the U.S.-Canada Free Trade Agreement, coupled with weak Canadian demand and more competitive unit prices for the Canadian product, made those...number of specialty-printing operations and home users that are employing personal

computers and laser printers for personalizing, addressing, and otherwise customizing stationery, mail-order **catalogs**, business forms, contracts, and envelopes. Envelope converters are designing new product lines with compatible adhesives or sealers for use in laser printers by specialty printing...of these envelopes are sold by various retail outlets

directly to consumers and the business community, for mailing letters, bills, receipts, small business transactions and **purchase orders**, and other forms of general personal or business correspondence. In addition, another large portion of these envelopes are shipped by converters and manufacturers to printing...

...and other businesses.

The other domestic envelope sales in 1992 (amounting to \$373 million or about 15 percent of the total) were dominated by **heavy-duty**, padded shipping envelopes and mailers. The continued growth of two-income families, various "shop-at-home" services, and the direct-mail order industry have contributed...

...depreciating U.S. dollar, the merchandising of U.S. envelopes to foreign

markets to help ease an overcapacity problem, and the ongoing removal of Canadian **tariffs** on U.S. paper and allied products under the U.S.-Canada Free Trade Agreement (FTA) contributed significantly to higher U.S. envelope exports in...product lines in the specialty envelope sector, but the standard business envelope sector will experience only marginal growth. In January 1993, the final stage of **tariff** elimination under the U.S.-Canada FTA takes place and will have a positive impact on U.S. shipments to Canada. Total envelope exports to...

19930100

12/6,K/42 (Item 13 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB
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06219806 **Supplier Number:** 13277508 (USE FORMAT 7 OR 9 FOR FULL TEXT)
U.S. mergers and acquisitions. (The M&A Rosters: First Quarter 1992)

July-August, 1992

Word Count: 79730 **Line Count:** 07395

...92
Flow International Inc. acq. Rampart Waterblast Inc.
Kent, WA Sarasota, FL
Revenues: \$41,527,000 Net Loss: \$506,000 Year End: 4-30-91
Terms: Flow International acquired the remaining 90-percent interest in Rampart Waterblast. In July 1991, it had acquired a 10-percent interest in the company. Terms...Effective Date: 3-2-92

22 TEXTILE MILL PRODUCTS
Mayo Yarns Inc. acq. Highland Yarn Mills Inc.
Tarboro, NC unit [two yarn facilities]*
Raleigh, NC
Terms: High Yarn Mills, a subsidiary of Texfi Industries Inc., reached an agreement in principle and sold two yarn facilities to Mayo Yarns for \$13.5...

...to reduce the observability or detectability of an object by various types of sensors that function in specific parts of the electromagnetic spectrum. Such products **include** the visible, infrared, microwave, or radio frequency portions. Its defense and defense-related products include various custom films on flexible and rigid substrates, and a...

...and beer distributors, and overnight package couriers. It also provides design, planning, and implementation service identity uniform programs; offers complete uniform service programs to customers, **including** maintenance, replacement, and redesign or modernization of uniform styles

on either sale or rental basis; and manufactures uniforms to the customers'

specifications. In addition, it...WOOD PRODUCTS

CHSNX Corp. acq. M. Kamenstein Inc.

White Plains, NY

Revenues; \$34,758,000

Net Inc.: \$2,074,000

Year End: 12-31-90

Terms: CHSMK, a corporation consisting of Code, Hennessy & Simmons, members of M. Kamenstein management, and other third-party investors, acquired M. Kamenstein for \$26.1 million...PUBLISHING

Colwell Industries Inc. acq. Sunday International

Minneapolis, MN Terms: Colwell Industries acquired Sunday International for an undisclosed consideration. Principals: Colwell Industries prints magazines and **catalogs** and manufacturers color merchandising programs. Sunday International is a color card company.

It

has manufacturing facilities in Mexico and warehousing facilities in California. Upon completion...treatment of diseases of the eye and for the correction and enhancement of vision. Ophthalmic product lines include products for eye diseases and disorders that **include** glaucoma, infection, allergy or dry eye, and inflammation; contact lenses, lenses care products, intraocular lenses, and surgical products; corneal analysis and retinal analysis; microprocessor-based...

...the past three years, Entravision has manufactured a large quantity of Allergan's disposable accessories for phacoemulsification, which is the least invasive procedure used to **extract** cataracts during surgery.

Effective Date: 3-3-92

Cambrex Corp. acq. Hexcel Corp. (Hexcel Fine

...Net Inc.: \$2,277,000 Year End: 12-31-91 Terms: Reinhold Industries

Inc., a subsidiary of Keene, acquired Reynolds & Taylor from the Furon Co. **Terms** of the transaction were not disclosed. Principals: Keene, through its wholly owned subsidiary, Reinhold Industries Inc., custom manufactures advanced composite materials, ablatives, and structures for...

containers, such as tackle boxes, tool boxes, gun cases, and nonchemical

pest control devices. Frem is a manufacturer and marketer of injection molded houseware products, **including** recycling containers, storage boxes, laundry baskets, crates, drawer systems, kitchen organizers, caddies, trays, and shelves. Effective Date: 1-9-92

Fiserv Inc. acq. Data-Pro prices cover all ranges.

Its

Ring King Visibles Inc. unit designs, manufactures, and markets computer-related office furniture, **including** printer sound enclosures, printer stands, micrographic storage products, diskette storage trays, stand-alone furniture and workstation accessories. Its Heatilator subsidiary manufactures and markets pre-fabricated...

...of the transaction were not disclosed. Principals: Trinity Capital

Partners is a partnership between John T. McNiff and Mike Kennedy. Its Wincup Holdings Inc. unit **incorporates** three of the recent acquisitions, Winkler Corp., a straw and cutlery manufacturer, and two of Scott Paper's divisions, which produce paper and plastic cups...

...equipment. Principals: Ball and its subsidiaries manufacture packaging products, aerospace systems, and diversified products. It also provides professional services to the government. Its packaging goods **include** glass containers for the commercial food industry, metal containers for brewers and soft drink fillers, home food preservation products, and high-barrier coextruded plastic sheet...use in a variety of industries. Effective Date: 3-3-92

Alliance Precision Plastics	acq.	Gleason Corp. {Alliance
Corp.	unit	Precision Plastics
		division}* Rochester, NY

Terms: Alliance Precision Plastics acquired the Alliance Precision Plastics division of Gleason for an undisclosed amount. Principals: Alliance Precision Plastics is a closely held private company

...and hardware and software enhancement. Triad was the winner of the 1991

Total Quality Award from the information Technology Association of America.

Triad's electronic **catalog** and its derivative products were used at about 20,000 automotive counter positions. Ultimate Inventory Solution Solutions, a unit of Ultimate Corp., is a supplier...Publication Systems is

a leading microfilm publisher of proprietary databases and technical information. Publication was also the first to successfully introduce a proprietary computer-based **catalog** system, the IDB2000 desktop workstations. Its mail handling subsidiary, Bell & Howell Phillipsburg Co., is the world's leading manufacturer of high-volume mail processing...cash. Textron also assumed all product liability that might arise from

Cessna. The RTC granted an early clearance for the required waiting period

under antitrust **laws**. Principals: Textron is a multi-industry concern, with operations in aerospace technology, commercial products and

financial services. Its aerospace technology includes rocket propulsion systems, air...soliciting competing proposals and to pay a breakup fee in

certain circumstances, though it could take such action as was necessary to

fulfill its fiduciary **duties** to its shareholders. Principals: Newell manufactures and markets consumer hardware and housewares and certain industrial products to the volume purchaser. Its products include drapery

hardware...the U. S. It operates 304,915 access lines in 14 states, primarily in Wisconsin, Louisiana, Michigan, and Arkansas. It also participates in uniform access **tariffs** and pooling arrangements for intrastate and intra-LATA (Local Access Transport Area) services. It also

is connected to long-distance carriers. Coltewah-Collegedale, a subsidiary
...to industries and institutions that include food, housekeeping services,
and textile rental and maintenance. Wear-Guard directly markets its uniforms and work clothing through a **catalog** and mail-order houses. It became a part of Aratex Services Inc., a subsidiary of ARA Services Inc., a subsidiary of ARA Group. Effective Date...services. At June 30, 1990, deposits totaled \$347 million and it operated 16 branches. In addition, certain subsidiaries engage in real estate development and market
tax deferred annuities. It is a member of both the FDIC and the Federal Home Loan Bank of Atlanta. It operates 22 retail banking branches and...

...main office in Pettersburg. It is a member of the Federal Home Loan Bank of Atlanta and is insured by the FDIC. Its subsidiaries market **tax**-deferred annuities and engage in real estate development. The retail banking branch of Trust bank Savings is located in Lynchburg, Va. Trustbank Savings has been...million, or \$9.0514 per John Muir common share. Each John Muir share was exchanged for 0.4702 of a WestAmerica common share on a **tax-free** basis. WestAmerica issued approximately 422 000 new common shares to 500 John Muir shareholders. The transaction was accounted for as a pooling of interests...their customers to tailor its policies, include an automatic annual benefit increase, restoration of benefits, benefits for at-home care provided by a private duty **nurse** or homemaker, benefits for adult day care centers, as well as a return of premium benefit. Penn Treaty Life Insurance Co. is one of its...

...insurance industry, making available complete packages of life and accident and health insurance to employers. Through its wholly owned Protective Financial Corp., it markets **tax-deferred** annuities, securities, and ordinary life insurance products through financial institution sponsorship. It markets these products mainly through banks, savings and loan associations, mortage bankers, and...

19920700

12/6/K/43 (Item 14 from file: 148)
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05906145 **Supplier Number:** 12392161 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Network dyads in entrepreneurial settings: a study of the governance of exchange

relationships. (includes appendix)

March , 1992

Word Count: 13503 Line Count: 01155

...Two were manufacturing organizations (HiTech Computer and Support Products); one was a distribution company (Telephone Distributor); and the last was a combination of retail and **catalog** sales (Clothing Company). Each firm was operating in relatively turbulent competitive arenas. The telephone industry was experiencing deregulation, and Telephone Distributor and its partnered firm were attempting to carve out new market niches. Although the clothing company was in a mature market segment, it was actively growing its **catalog** business, an area of retailing that was experiencing very rapid growth in the mid-1980s. The computer hardware company was in a highly competitive environment...identified in Figure 1 with the names: Telephone Manufacturer (manufacturer of telephone equipment for small to medium-sized businesses), Clothing Manufacturer (an apparel manufacturer), Clothing **Catalog** (a printing company), HiTech Boards (designer and manufacturer of complex printed circuit boards), HiTech Assembly (assembler, only, of printed circuit boards), Support Breakers (manufacturer of...).

...1

Summary of interviews

Firm	Number	Interviews	
			Hours
Telephone Distributor	7		11
Telephone Manufacturer	4		6
Clothing Company	6		9
Clothing Manufacturer	3		5
Clothing Catalog	4		6.5
HiTech Computer	7		11
HiTech Assembly	5		7.25
HiTech Boards	4		6
Support Products	8		9.5
Support Breakers	3		

5...itself.

The decisions to enter the tight alliances that were studied were not based solely on short-term economic criteria but, rather, on multiple criteria, including long-term learning opportunities (e.g., what the entrepreneurial firm could gain from the expertise and innovative capacities of key suppliers and customers), ease of communications and...

taken the philosophy that says we are better off developing close relationships, personal relationships, with vendors.

Another example was provided by a manager at Clothing **Catalog**, who described Clothing Company's president's requests for meetings to

improve the way the two companies worked together.

He would call a meeting for...

...other firms with which he worked] only Clothing Company really listens.

The president of Clothing Manufacturer described the trial period:

[the founder of the entrepreneurial **catalog** company] kept pushing us [saying], if you do this, I'll do that. We did, and he did.

He

would suggest that if we would...improvements. A more established

company

used one of the small high-growth firms as a source of technical and

procedural innovation. A manager at Clothing **Catalog**, a larger and

more bureaucratic partner firm, illustrated this dynamic:

We are constantly changing things to try to improve the way we do business together...Assembly described his firm's alliance agreement and compared it to other outside economic transactions. He started with this

summary of typical external transactions:

A **purchase order**; that's it. Take X a nationally well-known computer company was named here], I have a contract that thick, and Y [another well-known...Etzioni, Amitai 1988 The Moral Dimension. New

York: Free Press.

Fama, Eugene F., and Michael C. Jensen 1983 "Separation of ownership

and control." *Journal of Law and Economics*, 26: 327-349.

Granovetter, Mark 1973 "The strength of weak ties." *American Journal of Sociology*, 78: 1360-1380. 1985 "Economic action and social...

19920300

12/6,K/44 (Item 15 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB

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05522212 **Supplier Number:** 11552075 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Authority control in a bilingual OPAC: MultiLIS at Laurentian. (bilingual online public access catalog, a MultiLIS system at Laurentian University in Northern Ontario)

Oct , 1991

Word Count: 9879 **Line Count:** 00838

Authority control in a bilingual OPAC: MultiLIS at Laurentian. (bilingual online public access catalog, a MultiLIS system at Laurentian University in Northern Ontario)

In a recent study on bilingual subject authority control, Rolland-Thomas and Mercure describe four necessary conditions for a bilingual online public access **catalog** (OPAC): (1) reciprocal references in the same file; (2) subject or term searching in either language from one bilingual thesaurus, with retrieval in either the...

...LC), she observed:

A relatively few library bibliographic systems have been designed to support a library in maintaining more than one controlled vocabulary in its **catalog** ... None has yet been employed specifically to assist patrons in retrieval from multiple thesauri.[2] The whole question of the management of database access points...

...majority of support and professional staff are either completely bilingual or have a good working knowledge of both official languages.

The use of a classified **catalog** for subject searches in a bilingual environment has already been described,[7] as well as the return to a more traditional, but bilingual, dictionary subject **catalog**, with reciprocal references.[8] Since 1976, when Laurentian became a member of the UNICAT/ TELECAT consortium in the UTLAS network, descriptive cataloging and subject analysis...

...Sobeco Group, of Montreal, Quebec, for the installation of MultiLIS. MultiLIS is a fully bilingual integrated library-management software package, with acquisitions, cataloging, circulation, online **catalog**, and report modules already in place. The initial version of the software also included a very powerful authority control component for basic maintenance of **catalog** access points. MultiLIS operates on Digital VAX hardware, using the VMS operating system, as well as on NCR computers with UNIX System V and on...by being made aware of titles in French on their topic.

The proposal that received the most attention was a return to a modified classified **catalog** for subject searches! All subject terms in English or French would be linked by the appropriate Library of Congress

Classification number for the headings; the...

...contract with the Sobeco Group provided for the introduction of an enhanced bilingual authority control system, linking equivalent English- and French-language headings in the **catalog**. Development and testing of this system was completed during 1988 and in the spring of 1989. In March 1989, Laurentian was asked to serve as...appropriate dictionary form.

Keyword index terms retrieve dictionary forms linked directly to bibliographic records.

The linking of dictionary terms to bibliographic records in the

online **catalog** ensures that blind references do not occur. Indexed forms from the seven dictionaries - author, corporate author, series, uniform title, publisher, document type, and subject - appear...

...in a university setting, or even collections within a single library can have a separate database or partition, each of which is completely independent in **terms** of cataloging procedures, **including** authority control, circulation policies, and purchase or budgetary decisions. However, all indexing is done on a network basis, with links to records in each partition...

...figure 4), available only to those authorized staff members, primarily in technical services, responsible for the entry or revision of access points in the online **catalog**. Figure 5 shows the authority control menu.

In addition to the traditional search terms - author, corporate author, series, uniform title, and subject - shown in the...

...disc," "microfilm," "microfiche," "pamphlet," "folder," "Northeastern Ontario Collection," or "Laurentian Authors Collection." The use of document type as an access point in Laurentian's public **catalog** will likely become more common, as an increasing number of publications issued in nonprint formats, such as microfilm, microfiche, compact discs, cassettes, and CD-ROM...

...the entry of publishers is also controlled by a list of forms, a dictionary, in exactly the same way as authors or subjects. Before a **purchase order** is generated in the order function of MultilIS, the publisher must be linked to a vendor, usually a book jobber.

By having a list of...

...processing required; that is, bibliographic records linked to an authority form are immediately upgraded, with any changes to access points being reflected in the online **catalog**. Figures 6 through 8 illustrate examples of revisions to a dictionary form, and merges of variant or superseded terms into one authoritative heading.

As many...

...of the screen shows the number of records updated for each heading. The only restriction is that while bibliographic records are being revised, the corresponding **catalog** work forms cannot be accessed or be in display mode. Under optimum conditions, it is possible to revise or merge personal author, corporate author, subjects...
...preceded by a double asterisk (**). All network authority records, regardless of the partition into which they were initially entered, will be displayable in the online **catalog**. Eventually, a third level of

control will be introduced for records from source files, such as LC authority tapes and CD-ROMs, or online authority...

...to accept the CAN-MARC authority format. Links between equivalent forms

of a heading are shown with an equal sign (=).

Search on the ON-LINE catalog

Subject headings

Search ...module are used with four of the seven system dictionaries, in order to provide links between English and French forms of heading in its bilingual catalog. The four dictionaries are personal author, corporate author, document type, and subjects. Bilingual forms for the remaining three dictionaries - series, publisher, and uniform title - are

...

...difference between transliteration schemes of Russian to English and Russian to French, e.g., Solzhenitsyn vs. Soljenitsyne, or Gorbachev vs.

Gorbatshev.

Search the ON-LINE catalog

Authors

Search request: PLATON

1: (2 rec.) Platon 2: (5 rec.) = Plato

Selection:

Search the ON-LINE catalog

Subject headings

Search request: ARISTOTLE

1: (2 rec.) Aristotle 2: (1 rec.) = Aristote

Selection:

Corporate Author

At Laurentian, the primary application of bilingual access for...

...for agencies of the Ontario government, which has recently undertaken to

upgrade its services to the province's French-language minority.

Search the ON-LINE catalog

Subject headings

Search request: STATISTICS CANADA

1: (1 rec.) Statistics Canada 2: (1 rec.) = Statistique Canada

Selection:

Another type of linkage applies to related headings...

...current heading, English or French; in an online search, the user will

be directed to these headings with the indented phrase.

Search the ON-LINE catalog

Search request: CANADA EXTERNAL AFFAIRS

1: (379 rec.) = Canada. Ministere des affaires exterieures 2: (2941 rec.) Canada. Dept. of External Affairs 3: (72 rec.) Use...

...author search, where cross-references, equivalencies, and related headings have been generated for one corporate entity. As noted above, indexing is done on all significant **terms** in a heading, **including** any cross-references. It is possible that terms used in rejected headings can refer to several established terms, which, in

combination with equivalency links, lead...exactly match the user's initial request.

Subject

The full impact of the bilingual capability of MultiLIS can be seen most clearly in the subject **catalog**. For subject control, Laurentian uses two principle thesauri, LCSH for works in all languages but French, and RVM, prepared by la Bibliotheque de l'Universite...

...list Canadian Subject Headings (CSH), [19] produced by NCL, for terms unique to Canada, where variations from LCSH are appropriate, e.g., GOODS

AND SERVICES **TAX** - CANADA, instead of the LC heading VALUE-ADDED **TAX** - CANADA.

Figure 22 shows the online equivalent link between an LCSH and an RVM heading. Whenever an equivalent term is added to an authority record...

...language, English or French, will also retrieve titles indexed with the equivalent term in the other language, as shown in figure 24.

In a bilingual **catalog** like Laurentian's, where publications cataloged in English and French are in the same file, conflicts occur when a term in one language also exists...

...present resources. Therefore, negotiations are currently under way to load Laval University's RVM authority tapes into Laurentian's database. Laval's subject authority records **include** the LCSH **term** as an equivalent form in the appropriate MARC tag, as well as all cross-references and related headings for French-language headings. Once this file...

...LCSH heading in Laurentian's database will be linked to its equivalent in the other language, and these links will be reflected in the online **catalog**, provided, of course, that the equivalent term appears in at least one bibliographic record. Tests are also under way for the uploading of ...to its equivalents in Spanish, French and German, and Italian, respectively. Again, as long as an equivalent heading appears in a bibliographic record, the online **catalog** will indicate the relationship of the headings with the equal sign. The upper limit for the number of equivalent headings in other languages that can...

...s manual for the authority module. It would appear that the MultiLIS authority system is ideally suited for libraries in countries or institutions where multilingual **catalog** access is a primary factor, e.g., Switzerland, the United Nations, and the European Community.

Search the ON-LINE **catalog**

Subject heading

Search request: SPAIN COLONIES

1: (1 rec.) Spain- - Colonies- - America- - Administration
2: (1 rec.) = Espana- - Colonias- - America- - Administracion

Selection:

Search the ON-LINE catalog

Search request: GERMANY HISTORY

1: (7 rec.) Germany- - History

2: (1 rec.) = Deutschland- - Geschichte

3: (3 rec.) = Allemagne- - Histoire

Selection:

Search the ON-LINE catalog

Search request: ITALIAN POETRY

1: (1 rec.) Italian poetry- - History and criticism

2: (1 rec.) = Posie italiano- - Historia e critica

Selection:

For large North American university library systems, where branch libraries for medicine or law may use alternate subject thesauri, such as Medical Subject Headings (MeSH), [22] the problem of linking specialized terms to more general LCSH terms in the same catalog has represented a significant challenge. Within certain limitations, the MultilIS authority module can link equivalent headings from different subject thesauri. Figures 28, 29, and 30...stations or system operations.

In addition, the fact that English and French subject terms, or related headings, can be linked and displayed in the online catalog means that most titles on a topic can be retrieved with only one search. The fact that users are directed from lay terms for a...

...the top rating given by Johnston for syndetic structure support. Given

the particular circumstances of Laurentian, a bilingual, multilibrary operation, the choice of MultilIS for catalog management does seem very appropriate. We are confident that, in cooperation with both the system vendor, Sobeco, and other MultilIS clients, most notably l'Universite...

...the position of MultilIS in the library automation marketplace.

References and Notes

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Multiple

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Resources & Technical Services 23:422-25

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Library (1989/90), p.6. [10.] A.B. Chitty, "Indexing for the Online Catalog," *Information Technology and Libraries* 6:300 (1987). [11.] In all figures, user input appears in boldface type. A after user input is understood but...

...copied from the main network partitions to the test environment, and the appropriate authority records were created. The test database is accessible in the online catalog, with the result that authority records created in test mode are linked to the network indexes; however, normally only six or seven of the partitions are accessed in Laurentian's online catalog, meaning that users are rarely, if ever, even aware of the existence and creation of records in the test database. While every effort has been...

Descriptors: ...Online catalogs-
19911000

12/6,K/45 (Item 16 from file: 148)
DIALOG(R)File 148: Gale Group Trade & Industry DB
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05438376 **Supplier Number:** 11080382 (USE FORMAT 7 OR 9 FOR FULL TEXT)
A buyers' guide to software for purchasing. (buyers guide)

July 18, 1991

Word Count: 5704 **Line Count:** 00501

...optional. Circle 353

Applied Micro Business Systems. STOCKMASTER 4.0 is a micro-based comprehensive inventory management system with purchasing order writing and tracking capability. **Purchase orders** are monitored on an individual transaction (line item) basis by item number, vendor number, P.O. number, due date, days overdue, manufacturing order number, and...

...which maintain a database of each supplier for each item and generate user/vendor item cross-reference lists, best leadtime analysis, and best pricing analysis. **Purchase order** writing and tracking functions are fully integrated with STOCK-MASTER 4.0 inventory management system, Circle 354

Armor Systems. Armor Systems offers a comprehensive **Purchase Orders** application as part of its 15-module Premier Accounting

Software package. **Purchase orders** allows users to create, change, view, or delete **purchase orders** and their accompanying detail. The **Purchase Orders** module posts all data specified and transfers data to the Inventory Control module. The system will track items and **purchase order** status by department, vendor, or other category. It can also quickly review drop-ship

addresses, cash flow, and item status. Additional modules can be fully integrated into **Purchase Orders** including Accounts Receivable, General Ledger, Payroll, Accounts Payable, Order Entry, Billing, Job Cost, and Bank Reconciliation. A report generator is available for custom reports. Also...

...Solicitation document production and Preliminary/Final/Amendment order document production are key system features that allow for the use of Standard, and Special, Terms and **Conditions**. The baseline software **includes** numerous management reports, and meets affirmative action and minority reporting requirements. AGPS is IBM mainframe-based and is available for implementation in VASM, DB2, IMS...

...Integrated Systems Inc. The TOPAZ Series is a comprehensive, seamlessly integrated set of software modules that encompasses the procurement cycle-automated production of quotations, electronic **purchase requisitions** with on-line approvals, **purchase orders**, receiving, material requisition and inventory control (stocked items), accounts payable, bar coding, and EDI. For medium to large organization environments that perform functions such as...

...on-fine, low-cost system that is designed to assist the buyer in making immediate 'smart' purchasing decisions. Programs included within PIC are:

Supplier database, **Purchase Orders**, Receiver, Overdue, Expedite, Supplier Directory, Business Cards, Telephone Directory, Cash Flow, Project tracking, etc. Flexible to meet the needs of Government, Service, and Industrial customers...DOS networks. Demo diskette, identical

to program, with limited input capability is also available. Circle 381

Lawson. Company's distribution management system includes order entry, **purchase order**, inventory control, accounts receivable and integrates with the Lawson Accounting System. The Lawson **Purchase Order** System provides historical data with information about vendor performance so that buying decisions consistently

maximize inventory investment. Users may analyze vendor performance by quality, quantity, cost, and timeliness. The system provides accurate ratings for vendor selection, saving time and eliminating tedious manual

calculations. It has an EDI interface file for **purchase orders** and acknowledgements. Functions include standard blanket or template order tracking; flexible unit cost defaulting (quantity breaks, **catalog** pricing, vendor pricing); inspection/rejection processing; substitute item handling; extensive commenting capability; variable decimal

place feature for cost, quantity; vendor analysis by quantity, quality, price...

...based integrated business system which automates material and personnel management. Use the software to input material requisitions, manage vendors, print and fax quotation requests, generate **purchase orders**, receive items, pay invoices, manage stockrooms, manage assets, retrieve item data from vendor supplied **catalogs**, and track human resource information. Supports PSSs, blanket orders, releases, and maintenance contracts. P.O.s may be printed, faxed, or transmitted via EDI.

The...

...Optional hardware: PC network, GammaFax fax board, Hayes compatible modem for EDI. Updates with additional features are provided twice a year.

Circle 384

Macola. A **purchase order** and receiving package is one of 17 modular, yet integrated, packages offered by this company. The total system consists of nine core accounting packages, eight...

...retail, and professional services. System features updated user interface, on-line integrated graphics, enhanced password protection, full screen editing and keyboard macros. Specifically, Macola's **Purchase Order** and Receiving package helps ensure that the correct quantity and quality of material is available when it's required. It requires company's Inventory Management and Accounts Payable 5.0 packages to be installed and functioning. The package supports three types of **purchase orders** for on-line entry and printing: normal orders, blanket orders and releases against blanket orders. The package will compare the receipt date with the request...

...allows real-time approval of P.O.s. System handles entire purchasing operation, from the receipt of a requisition to the final payment for a **purchase order**. It maintains standard **purchase order** clauses and item descriptions which you can include on P.O.s. It includes **tax** information, interfaces Accounts Payable system and conforms to EDI standards. Optional three-way match protects against overbilling. Available in NonStop SQL. Circle 387

Phillips Petroleum...

...items; an inventory and warehouse function for tracking storage, issues, receipts, order points, accounting, etc.; a procurement function for generating (EDI or printed) and tracking **purchase orders**, supplier information, etc.; and a major equipment function for maintaining bills of material, service history, operating environment, transfers, and cross-referencing for individual items. Circle...a complete purchasing and materials management system designed to address the unique requirements of MRO environments. Its three integrated modules address requisitioning,

request for quotes, **purchase orders** (including blanket, one-time, time and materials, etc.), materials management, and financial control for auditing of the vendor's invoice. Sophisticated replenishment techniques provide for system-generated requisitions and **purchase orders** based on an analysis of usage and demand history, supplier leadtime, and many other key factors. Circle 391
SDC Software Inc. Purchasing system is a...

...also maintains unlimited vendors, items and price quotations. The software includes integrated code lookups, a vendor name search, and multiple access paths for item and **purchase order** searches. The output of the system includes **purchase orders**, receiving reports, purchase commitments, expediting reports, open-order reports, and request for quotations. Other features include the ability to enter multiple general ledger account numbers...

...36 and AS/400 platforms. Source code included with system. Hotline support provided in package price at no charge. Circle 392
Software International Corp. Masterpiece **Purchase Order** is an on-line, interactive purchasing system optimized for the order processing function. Major functions include vendor performance; on-line inquiry; extensive reporting; P.O...

...and General Ledger. Masterpiece programs are written for use on the IBM 30XX and 43XX. Circle 393

Software Technology. Purchase Pro2 is designed to generate **purchase orders** and requisitions, track current price quotes, and monitor outstanding **purchase orders**. It can also perform inventory control functions and distribution management. Runs on IBM XTs or compatibles, and LANs. Circle 394
Software 2000 Inc. DM2000 provides...

...manufacturers. The module maintains detailed vendor information including vendor history and communications, material costs and variances, leadtimes, and delivery dates. Users enter, generate, and monitor **purchase orders** and blanket P.O.s easily. Purchasing also provides extensive text, and manual and automatic receiving. Flexible reporting provides status, cost variance, and transactions listings...
...and General Ledger modules. SYMIX runs on UNIX, AIX, HP-UX, XENIX, DOS

VMS and LANs. Circle 397

Technical Services Association. GATEWAY 2000, MRO processes **purchase orders**, change orders, service orders, requisitions, receiving documents, and quotations. Price extensions, discounts, and sales **tax** are calculated as orders are entered, and all data are updated automatically. The system's database permits full tracking of vendors, stock items, and standard pricing and generates more than 150 executive reports. **Purchase orders** and other documents can be

customized to match existing order formats. All functions are menu driven.

A search key activates pop-up windows which permit...generation, history, and management reports; receiving, with receipt entry, open/overdue order tracking, and vendor performance ratings; requisitioning, with requisition entry and automatic conversion to **purchase orders**; inventory, with inventory balances tracked at multiple inventory warehouse locations.

PMX-2's modular design allows users to start with a few modules and add...

...360

CACI. FAR-TRIEVE provides quick, accurate answers to acquisition regulation questions. When combined with office systems, can be used to research the Federal Acquisition **Regulations** and its supplements.

FAR-TRIEVE also has the ability to print the clauses researched as well as

22 standard forms. A yearly subscription entitles the...

...stock number changes; maintains purchase, price, and vendor

histories, ship-to addresses, item records, and purchase requests records. Circle 361

Cardinal Data Corp. PRO/FIT **Purchase Order** Management System has been designed to meet the needs of medium to large organizations

with complex purchasing requirements. The keystone of the system is the...

...minimizing clerical effort. The Purchasing system is a primary component

of CONTROL: Manufacturing. Major facilities include purchased item definition, vendor definition and sourcing, requisition and **purchase order** management, receiving control, invoice matching, and vendor analysis. Runs on IBM 43XX, 30CC; full DEC VAX family. Circle 364

Command Line Corp. The CLC-PM4 Management System for purchasing is a

complete purchasing system from requisitions and **purchase orders** to receiving and automatic update of inventory, vendor, and purchasing history files. The system maintains buy card files and tracks

non-database purchases as well...s Toolkit runs on IBM and compatible personal computers. A site license and customization are available. Circle

366

Computer Task Group Inc. (CTG). POM/ TAS **Purchase Order Management** is an on-line, real-time purchasing-receiving-accounts-payable system that operates on IBM mainframes. The system includes vendor quotations, **purchase requisition** processing, requisition-to-**purchase-order** conversion, on-line **purchase order** action lists and printing, on-line receipts to **purchase orders**, and full accounts payable capabilities. Provides full on-line inquiry plus detail and summary reporting. CTG tailors POM/TAS to

its clients' specific requirements including...

...of Inventory, Purchasing, and Accounts Payable modules. The Purchasing System is an on-line, real-time system that automates the entire procurement cycle from processing **purchase requisitions** through quotations, **purchase order** generation, receiving and inspection. Invoice payment authorizations are processed via integration with the Accounts Payable System. The System is designed to accommodate the needs of...

...Dynamic Software. QPII includes a sophisticated vendor activity management program which has been derived from Dynamic Software's Sales Activity Manager line of software. QPII **purchase orders** feature an unlimited amount of header and line item comments. Standard boilerplate comments may also be used for repetitive requirements. QPII supports change orders, supplemental...

...quote tracking, and inventory management. QPII runs on IBM compatible PCs and most LANs. Single user and multi-user versions are available. Circle 371

Genzlinger. **Purchase Order** Processing (POP) creates and maintains purchasing records and ensures the quality, accuracy, and promptness of deliveries of purchased materials. POP's capabilities for predicting cash...

...entry and editing of regular and blanket P. O. s; and records multiple vendors' part numbers for each inventory item. Circle 372

Global Software Inc. **Purchase Order** System features include automatic interface to General Ledger and Accounts Payable, Inventory Sales Analysis, and Hospital Materials Management Systems; complete interactive **purchase order** and requisition creation on-line; requisition tracking; recurring and model order capabilities; interactive receipt matching and invoice processing; immediate order printing; real-time analysis and corrections; on-line inspection and quality control; full real-time validation; expense and budget control; vendor performance analysis; forecasting of commitments; and optional batch

purchase order to create receipt activities. The product fully supports the X.12 EDI standard both in sending information to external vendors and in updating the **purchase order** record with a confirmation of receipt of the order. A one-year warranty is included. Operates on IBM mainframe and midrange systems, including 30XX, 43XX...screen providing users with instant help. Many reports, including a report generator, are standard. Other options supported include internal FAX, bar coding, EDI interfaces, custom **Purchase Orders**, and custom interfaces to Maintenance Management Systems. Recently added is the Invoice Matching module that interfaces with Blue Chip allowing on-line matching of invoices using the receiver and **purchase order**

generated by Blue Chip. General Ledger distribution and payment can be made or passed on to your mainframe through a custom interface. The software is designed to run using MS-DOS in PC networks. Circle 376

IMREX. **Purchase Order** Management system features multi-company, multi-warehouse, multi-currency capabilities; real-time generation of **purchase orders** for inventoried and non-inventoried items; cross reference ability of vendor item number to your number; blanket orders, requisitions and reservations; consolidations of multiple requisitions by vendor and by item to ensure best price and quantity discounts; multiple receipts per **purchase order**; multiple ship-to addresses per **purchase order**; comprehensive vendor performance and analysis; copy order feature; and dynamic search of the vendor and item database. Circle 377

19910718

12/6/K/46 (Item 17 from file: 148)

DIALOG(R)File 148: Gale Group Trade & Industry DB
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04500908 **Supplier Number:** 08049130 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Third annual 1990 directory of human resources services, products and suppliers.
(directory)

Jan , 1990

Word Count: 105313 **Line Count:** 10071

...Premium, 10 N.

Park Dr., P.O. Box 798, Hunt Valley, MD
21030; 301-527-7115

Contact: Richard MacDonald, Premium
Sales Manager

Individual awards, premium **catalog**, plateau
programs that include power tools, lawn and
garden equipment, and accessories.

Michael Convey, Vice-President, Sales
Gary Di Camillo, President, U.S. Power
Tools...

...Contact: Mr. Stan Phillips, President

No. of Employees: 12

Employee recognition awards. We custom
engrave awards on the premises and have
an employee safety awards **catalog** that is
free upon request.

John Karges, Operations Manager

Cheryl Wilbon, Manager, Customer Service
Dimensional Services Co., P.O. Box 5061,
Peoria, IL 61601; 309...M. of corporate business gifts, employee
recognition awards, products for service

awards, safety programs, and incentives. Designs special one of a kind awards and produces **catalogs** for service award programs.

William Barra, President
Robert Anderson, Director
Parker Pen USA, Ltd., 1400 N. Parker Dr.,
Janesville, WI 53545; 608-755-7177
Contact...Ross Jewelers, 347 Union St., Lynn, MA
01901; 508-532-5099; 800-255-Ross (in
MA)

Contact: Ms. Amy Perry, Marketing Director
Our corporate gift **catalog** has 28 pages of
fine gifts for all occasions (service,
incentives, holiday, company celebrations,
conference mementos) including: clocks from
Chelsea, Howard Miller, Benchmark; Svend
Jensen, Royal Copenhagen crystal; Baldwin
Brass; and Geoffrey Beene leather goods,
jewelry, and watches. We offer custom
design services and "creative executive gifts."
Call for free **catalog**.

Robert Ross, President
Amy L. Perry, Corporate Marketing Director
RPM, Inc., 7147 Shady Oak Road, Eden
Prairie, MN 55344; 612-944-5137
Contact: Gene Bachman...Club features men's
and women's business clothing, direct from
a Fortune 500 manufacturer, at 40% to 50%
off comparable retail prices. For a **catalog**
and additional information regarding our free
program, call 404-653-1303
Steve Sweat, Vice-President, Marketing
Wesley Howard, National Sales Director
Corporate Health Designs, P..312-963-7000
Contact: Bernadine Drzastwa,
Administrative Assistant
No. of Employees: 5
In this age of givebacks, flexible benefit
plans, ESOPs, 401(k)s, changing **tax laws**,
down-sizing and cutbacks, and early
retirement offerings and incentives, employers are
increasingly concerned about helping
employees understand and cope with their
financial options and...60606;
312-346-0155
Contact: Mary Lou Williamson,
Vice-President, Marketing
No. of Employees: 120
Thomas L. Jacobs provides complete
administration of short- and long-**term** disability
benefits with aggressive follow-up and Social
Security and rehabilitation specialists on
staff. We also handle audits of disability and
medical plans, claim manuals...Executive Group CarveOut are
designed for companies with 100 or more
employees, allowing employees to purchase
universal life on a payroll deduction basis

with a **tax**-deferred cash account. With Group Variable Universal Life, employees can spread their **tax**-deferred investments among five investment vehicles.

Carl H. Anderson, President/CEO
Sharon L. Baysinger, Vice-President,
Employer Sponsored Mass Marketing
Pearle Health Services, Inc., Managed...Trail
South, Rochester, NY 14625;
716-385-6666; 800-322-7292
Contact: Ms. Rosemarie Garofalo,
Advertising Manager
No. of Employees: 1,500
Payroll and payroll **tax** preparation service for small to mid-size businesses.

B. Thomas Golisano, Chairman, CEO
G. Thomas Clark, Vice-President Finance
Total Compensation Systems, Inc., 5699
Kanan...retirement and welfare plan design, health care cost containment, compensation/benefits surveys, executive compensation studies, job evaluation, personnel development, and organization planning. Arthur Young Expatriate **Tax** Advisors help employers control **tax** costs of relocating and compensating employees on international assignments through **tax** planning and compliance assistance.

Steven Kates, Partner
The Atlanta Consulting Group, 2028 Powers Ferry Rd., Ste. 190, Atlanta, GA 30339;
404-952-8000; 800-852...

...Mukamal, 2 Park Ave., New York, NY 10016; 212-686-3838
Contact: Mr. Philip J. Kleiner, Partner
No. of Employees: 100+
Legal Services in Immigration **Law**, Visas for Foreign Nationals including intra-company transferees, new hires, foreign students graduating in the U.S.

Bauer & Associates, Inc., 210 E. Huron, Ann Arbor...Contact: Advertising Director
Maintenance management consulting and MODCAM, software that features work order tracking, equipment history, preventive maintenance, inventory control, nameplate tracking, job planning, and **purchase order** tracking.

Mike Lawson, President
The Morse Group, 177 Main St., Ste. 321, Fort Lee, NJ 07024; 201-845-6325
Contact: Robert A. Morse, Executive Director...

...of Employees: 21
Organization Design and Development, Inc.

publishes experiential learning materials, provides organizational learning experiences, and consults in program design. The HRD Quarterly, a **catalog** of materials for trainers and group facilitators distributed worldwide, is published by OD&D Resources, a division of Organization Design and Development, Inc.

Rollin Glaser...000

Provides wide range of consulting services related to: compensation and benefits, personal financial planning programs, preretirement counseling, international assignments administration, employee communications, information systems, **taxes**, insurance and actuarial matters, relocation, strategic planning, organizational analysis, litigation, performance evaluation, job evaluation and classification, succession planning, employee assistance programs, labor relations, wellness programs...Human Resources Software for 17 years. Integrated payroll and HR systems are available on DEC VAX, HP 3000, IBM main frames and Unisys computers. Support, **tax** maintenance, and implementation planning are provided.

William E. Hixson, President

Branch Offices:

P.O. Box 134, Furlong, PA 18925;
215-794-7121

2201 N. Collins...in

employee status. Masterpiece Payroll/Personnel provides online, realtime processing. Features include: general ledger interface, flexible-time input, 40 voluntary deductions/reductions, multiperiod processing, and **taxes**.

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Mark Wasliko, Senior Vice-President, Marketing, Financial and Micro Products Group

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valuations, and documents; printing federal 5500 forms, schedules, SARs, and reports; providing plan/trust accounting; illustrating qualified plan distributions and **tax** analysis.

Aaron Venouziou, President

Andrew Hoskins, Vice-President

Decision Graphics, Inc., P.O. Box 2776, Littleton, CO 80161; 303-796-0341

Contact: Sales Department

Decision 3000+ cities. COMPETITIVE SALARY ASSESSOR: rates 2500+ commonly surveyed jobs. VALUATION ASSESSOR: gift, **tax**, ESOP planning. MARKET PLANNING

ASSESSOR: simulates product sales potential
in 3000+ N. American cities. (\$92 each/quarter,
\$279 annual subscription.)
Educational Data Systems, Inc., 22720...

...305-595-PUTT

Contact: Mr. Jack Putt, President
Our marketing and turnkey software system
provides: Employee Benefit Statements,
Section 125 - Employee Proposals, Section
125 - Employee **Tax Savings**, Fringe Benefits
Cost Analysis, Employee Counseling Control
Report.

Jack R. Putt, President
Five Technologies, Inc., 28 West Grand Ave.,
Montvale, NJ 07645; 201-930...No. of Employees: 10
FLEX 125 handles all aspects of flexible
benefit program administration including
communication, enrollment, credits calculation,
check writing, and audit trails. Prepares **tax**
savings reports for employees and
statements for management. Allows electronic
import of information from payroll systems
and the export of data for specialized
reports. TPA...handbook and
takes the drudgery out of writing personnel
policies. Edited by Richard J. Simmons, a
noted labor attorney, it provides human
resource and labor **law** information, educates
you on the important personnel and legal
questions, and writes the policies for you.

Michael Troy, President
Rudy Laco, Vice-President
Lawson Associates...790-9203

Contact: Carolyn G. Bogdanoff
Expatriate Assignment Management System
(EAMS) handles all aspects of expatriate
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recordkeeping. EAMS processes compensation
and **tax** data for expatriates of 25
nationalities. This system integrates day to day
personnel, compensation, and host location
data management with an individual
company's international...Asset Management System
contains an on-line skill assessment and
development function that utilizes skill profiles with
preset proficiency standards, a glossary, and
a course **catalog**. A skill and training
data-base administers the training function and
conducts skill gap analyses. For
performance management and career,
succession, and skill planning.
Steven...

...Internal work force information
can be imported into both programs from
mainframe or PC. Each is menu-driven,

requires no programming skills, and meets OFCCP **regulations**.

Dr. David W. Peterson, President
Profiles International, Inc., Corporate Headquarters, 2350 Airport Frwy., Ste. 200, Bedford, TX 76022; 817-354-1704
Contact: Milt Cotter, President...and manage a childcare operation. Information is also included to help employees find existing childcare facilities. \$11.95 plus \$2.00; NYS orders include sales **tax**.
Alfred Weiner, Publisher
American Management Association, AMACOM Publishing Division, 135 W. 50th St., New York, NY 10020; 212-586-8100
Contact: Lisa Harrison, Trade Sales...

...CompFlash is a monthly newsletter for those who deal with compensation and benefits. It describes new developments in the field, salary and wage surveys, government **regulations**, pension and benefit news, and available publications. Annual index in December. 12 issues for \$75.00 (\$67.50 for AMA members). Management Review is a...Manager
No. of Employees: 16
Hardcover and softcover books on topics in labor relations, supervision and management, compensation, staffing, occupational health and safety, and labor **law**.
Mary Green Miner, Publisher
Burraff Publications, A Division of The Bureau of National Affairs, Inc., 1350 Connecticut Ave., N.W., #446, Washington, DC 20036; 202-862-0990
Contact: Ms. Lori Keller, Marketing Manager
We publish the following newsletters: AIDS Policy & **Law**, The National Report on Substance Abuse, Immigration Policy and **Law**, The National Report on Work & Family, and Work in America. The most recent issue will be sent upon request. We also publish Drug-Free Workplace...W.
Peterson Ave., Chicago, IL 60646; 312-583-8500
Contact: Mr. James F. Golden, Asst. Vice-President
No. of Employees: 5,000+
Published of looseleaf **tax**, labor, human resources, social security/medicare, securities/finance and trade/business **law** services. Major publications include: Human Resources Management (compensation, employment relations, EEO, personnel practices/communications, OSHA compliance, Ideas and Trends Newsletter), Labor **Law** Reports, Employment Practices Guide,

Labor Arbitration Awards, OSHA Compliance Guide.
Richard T. Merrill, President
Edward L. Massie, Executive Vice-President
Craighead Publications Inc., P.O...

...276-3162
Contact: Mr. James Gerard, President
No. of Employees: 18
We publish business books many of which are directed to the personnel field. Free **catalogs** are available upon request.
James W. Gerald, President
Richard Slapkey, Vice-President
Great Performance Inc., 700 N. Green St., Ste. 302, Chicago, IL 60622; 312...million
No. of Employees: 9
HRD Press specializes in producing high quality, low-cost books, software, and training materials for the human resource professional. Free **catalogs** are available.
Robert Carkhuff, Director
Human Resource Executive, 1035 Camphill Rd., P.O. Box 579, Fort Washington, PA 19034; 215-540-1180
Contact: Donna Sickles...

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James H. Kennedy, President, Editor and Publisher
Kathleen Kennedy Burke, General Manager
Leadership, Education and Development, Inc., P.O...

...mental health services. Booklets and data available on mental health insurance coverage, benefit design, and managed care programs (e.g., psychiatric case management). Free resource **catalog** available.
Robert L. Thomas, Executive Director
National Planning Data Corporation, VNU Business Information Services, Inc., 20 Terrace Hill, P.O. Box 610, Ithaca, NY 14851...benefit news. Our editors review more than 200 publications and then summarize 75 to 80 of the most important articles on pension fund investments, federal **regulations**, pension and profit sharing issues, ESOPs, healthcare cost containment, and other human resource issues.
Personnel Department Store, Borgman

Associates, 321 Lennon Lane, Walnut Creek, CA 94598; 415-944-5544; 800-942-4494
Contact: Gloria Webster, Manager
No. of Employees: 23
Useful tools in four areas of Personnel **Law**, Employee Productivity, Policies and Practices, and Systems and Records. Resource and reference products include newsletters, software, manuals, forms, and cassette tapes, including ABRA 2000, COBRAPlus, Performance Mentor, cassette series on Personnel **Law** and the Personnel Assistant's Job Today, and many reference guides.
Ronald Borgman, President, Borgman Associates
Gloria Webster, Manager, Personnel Department Store
Personnel Journal, P...
...Policy Manual is updated monthly and includes 66 specially prepared and ready-to-use model policy statements. It reviews management considerations and cites over 800 **laws**, **regulations**, and court cases. A newsletter and subscriber inquiry service are included. Free 30-day trial review; 1-year subscription, \$317.00.
John C. Norman, Jr...
...800-431-9025
Contact: Alan Kellett, Advertising Director
No. of Employees: 350
Benefits Coordinator is a 6-volume looseleaf, biweekly-updated service that analyzes the **tax** and legal considerations of employee benefits. Employment Coordinator, a 17-volume looseleaf, monthly-updated service, gives full-range coverage of employment **law**, with forms, language, and plans.
Employment Discrimination Coordinator is an 8-volume looseleaf, biweekly-updated service that covers both federal and state employment discrimination **law**.
Science Magazine, 1515 Broadway, New York, NY 10036
Contact: Mr. Edward C. Keller, Vice-President, Recruitment Sales
Science Magazine, the research weekly, has a paid...of a Testing Resource Manual, which provides detailed information on testing procedures and accuracy, public and private sector use, federal and state legislation, and case **law**, and a Biweekly Reporter, which analyzes and summarizes recent developments.
University Research Associates, Arizona State University Research Park, 7855 South

River Parkway #112, Mesa, AZ...work place for your company. Pre-employment, random, and for-cause testing for all drugs of abuse. Testing profiles adhere to all NIDA and DOT **regulations**. Nationwide collection service and EAP available.

Steven Ciancio, CEO

Dr. A. Dhar, Ph.D., President

Greentree DES Systems, 1159 Granito, Laramie, WY 82070; 307-766...pinpointing individual and organizational strengths and weaknesses, identifying leadership potential, and discovering individual interests and skills. This, in turn, can augment company productivity and morale.

Catalog available upon request.

Charles W. Oswald, Chairman of the Board and Chief Executive Officer

David C. Malmberg, President and Chief Operating Officer

P.O.S...compares the individual to other successful employees in a particular position for pre-hire, promotion, or training purposes.

This industrially validated questionnaire meets all governmental **regulations**.

Sue Montgomery, Vice-President

Cathy Manning, Dir. of Training

William Steinberg Consultants, Inc., 7 Albion Rd., Hampstead, PQ H3X 3L8; Canada, 514-483-6954

Contact...J. Larry Railey, President

No. of Employees: 3

Established in 1978, we specialize in the nationwide and international search for attorneys and legal executives for **law** firms and corporate legal departments. We undertake searches ranging from entry-level positions to legal administrator, partner, and general counsel and assist in **law** firm mergers of any scale or complexity.

J. Larry Railey, President

Recruitment Alternatives, Inc., P.O. Box 554, York House E., Moorestown, NJ 08057; 609...1.3 million

No. of Employees: 14

Retainer based executive and middle management personnel search firm with specialists in: advertising, accounting, banking, data processing, engineering, **law**, manufacturing, insurance, retail, real estate, sales, healthcare, government, and printing and graphics.

Bill Dubbs, Managing Partner

Mark Sathe, President

Arlene Clapp, Senior Vice-President

ScienceTemps...ad hoc reporting; it calculates the precise gross-up needed (and produces an IRS substitute form

4782) while considering all federal, state, local and FICA **taxes**.
Impact Group, 8505 Delmar, Ste. B, St. Louis, MO 63124; 314-997-5137
Contact: Laura Herring, President
Momentum for the Relocating Spouse and Family is...International Airport in Kenner, LA, the company's 25-acre terminal includes three warehouses with over 70,000 square feet of storage space. Security's **tariff** rates are lower, but Security's personalized service makes a move with Security "The Best Move You'll Ever Make."
Charles Wolchansky, President
Donald Goldwasser...

19900100

12/6/K/47 (Item 1 from file: 275)
DIALOG(R)File 275: Gale Group Computer DB(TM)
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02066769 **Supplier Number: 19436566 (Use Format 7 Or 9 For FULL TEXT)**
Setting up shop on the Web. (IBM's Net.Commerce 1.0, iCAT Electronic Commerce Suite 3.0, Microsoft Merchant Server 1.0 Internet/web server packages) (includes term glossary and related article on commerce tips) (Software Review)(Evaluation)

June , 1997

Word Count: 3631 Line Count: 00283
...shop on the Web. (IBM's Net.Commerce 1.0, iCAT Electronic Commerce Suite 3.0, Microsoft Merchant Server 1.0 Internet/web server packages) (includes term glossary and related article on commerce tips) (Software Review)(Evaluation)

Abstract: ...Commerce Suite 3.0 is the best choice for database and Internet neophytes, but interoperation with existing systems may prove difficult. iCat revolves around a catalog of goods, with satellite management tools. Edits are made to an interim database before posting to the final version, which can make version control an...

Abstract:

...be built on the fly. These products are good for developing custom Web-based forms, such as those that let visitors search an entire online catalog for a particular feature.

Then there are application-development environments, such as Bluestone's Sapphire, that let you publish parts of a database on the...

...Once you've decided on a database server, it's time to look for a storefront software suite. Typically, the suites contain four elements: a

catalog or database to which you add items to sell; a storefront designer to arrange them and to add graphics; an ordering and inventory system; and a shopping cart system for customers (and you) to keep track of purchases as customers move from page to page and pay for their goods. These elements can...

...deal of integration, setup, and programming required before you can open a storefront. You'll need to, for example, match ZIP codes with regional sales taxes and adjust prices to reflect promotions.

And the suites are pricey. While you might pay several hundred dollars for each single-function tool, suites cost...

...example. Each comes with at least one sample storefront that you can modify and use to start your own store. The suites also come with shopping cart systems, making it easier to develop a way to track what shoppers choose.

The leading NT-based commerce suites are iCat's Electronic Commerce Suite...if you have CGI and Perl programming expertise or plan to use a consultant who has these skills. The "homegrown" Perl solution, developed for a shopping cart system such as the one at www.egrafx.com/minishop, provides much of the same functions for about the same cost. If you're already...

...a suite's functions at a much lower cost.

If you can't afford a storefront suite, consider single-function tools. You could use a shopping cart system from Mercantec, a search/index tool from Saqqara, and an accounting tool from Inex and still spend much less than you would for the...s suite instead.

The Ms Merchant Server gives you a list of items for sale and buttons that let you search the directory, view your shopping basket, and check out.

iCAT Electronic Commerce Suite 3.0
COMPANY: iCat Corp., Seattle, WA PRICE: Professional, \$9,995; Standard
\$3,495 AVAILABILITY: Now UPGRADE: Information not available OS SUPPORT: Win
95, Win NT PHONE: 206-623-0977 URL: www.icat.com

The heart of iCat is its catalog of store items and the tools for managing them. It also has software for designing Web storefront pages and tracking purchases. As with Merchant, you...
...Third, you specify the location of all HTML pages, databases, and other files you're using. Finally, you set sales options; for example, specifying sales-tax rates for particular locations. Many of these options are already part of the sample hardware store database.

The sample store is well designed, too, and because of this, it's easy

to see how various screens relate. For example, the sales-tax screens match a sales-tax rate with a ZIP code. You still must enter both pieces of information, but at least the data structures are specified.

However, there isn't...

...and is more extensible. A cottage industry of third parties has grown up to supply iCat with add-ons, including payment-authorization software and sales-tax calculators, and these add-ons work only with the more expensive version. We also recommend buying additional memory to bring your server up to at...

...databases or the Net, iCat is the best suite. It has good tools for beginners with little HTML expertise and offers easy-to-set up shopping cart and accounting systems. If you don't already use computer-based accounting or inventory tools, this is a good place to start. If you do, you might have some trouble integrating your storefront with existing systems.

iCat's Commerce Suite has a Web-based catalog editor that lets you add items to your store and change prices.

IBM Net.Commerce 1.0

COMPANY: IBM, Armonk, NY PRICE: \$5,000 AVAILABILITY...

...need to set up shop: a Web server (IBM's Internet Connection Secure Server), a database server (IBM's DB2), and e-commerce pieces, including shopping cart and credit card-verification apps.

Setting up the servers should be straightforward, but we encountered problems and had to reinstall the product several times. Once...so be sure you've got all the bits and pieces you'll need at hand.

* Export business. Get your existing accounting, inventory, and product-catalog data into comma-separated files if you want to export this data to any Web commerce system. This is the universal data-interchange format--for now.

Putting Together the Pieces of a Web Storefront

SHOPPING CART SYSTEM

Tracks user purchases and checks out purchases.

PAYMENT PROCESSOR

Processes transactions and payments.

DATABASE SERVER

Handles transactions and maintains data on store items, customers, and so forth.

CATALOG MANAGER

Adds items to your database, matches icons and graphics with store items, and presents catalogs for viewing.

ACCOUNTING MANAGER

Takes information from the shopping cart and passes it to corporate accounting.

WEB SERVER

Displays the storefront.
Related article: Glossary
merchant bank account
A merchant bank account instantly authorizes credit card...

...SET
Secure Electronic Transactions provides encrypted communications
for
credit card payments among the card issuer, the cardholder, and the
bank.
Visa and MasterCard developed SET.
shopping cart system
A series of Web-based forms that track a customer's purchases as
he or
she navigates a site.
SHTTP
Secure HyperText Transfer Protocol...

19970600

12/6/K/48 (Item 2 from file: 275)
DIALOG(R)File 275: Gale Group Computer DB(TM)
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01965435 Supplier Number: 18548007
Nexpo '96, II: editorial and advertising systems and electronic publishing. (includes
related article on Freedom System Integrators' addition of Phrasea to its product
line) (Industry Trend or Event)

July 29, 1996

Word Count: 41501 Line Count: 03239

...Services featured Atan HTML, its application for converting Atex
files
to HTML coding. It is already in use at Jyllands- Posten in Aarhus,
Denmark, and Law Journal Extra, a legal daily in New York.
Juliano also reported that its Blue Skii system for paginating
classified ads from an SII system is...line, we were told.
* Enterprise, the advertising suite that includes Contact Manager,
Space Reservation and Contract Management, plus a version for smaller
installations.
* Catalynx, the catalog production software included in the
Dewar acquisition.
* NetInk, a new tool for automating the production and maintenance
of
online catalogs.
* TrackPage, a system for tracking production of editorial and
advertising pages that has been undergoing testing at the New York
Times
and Boston Globe.
* Tools...

...tool. The intention is to be able to use a content database to
produce

publications both in print and online. One example Sysdeco gave was **catalog** publishing, where its Catalynx software, developed by Dewar, already can produce paper documents but would be used also for producing

catalogs either on the Internet or on CD-ROM.

NetInk will consist of facilities for handling such tasks as building templates to control the structure of...has been filled incorrectly. As many as 500 publishers can be added to the send list.

An Autofill button automatically reads in information, such as **purchase order** numbers, control numbers, revision numbers and run dates, stored in the business computer database. Mercury reads in the original ad and generates a new filefile...by various local community groups.

In addition, IBM has added shopping capabilities with its NetCommerce system for the purchase of music, books and travel. A **shopping-cart** application allows users to select items they wish to purchase and have them appended to their bill. The display allows users to adjust the quantity...text over the centuries, and now, with the aid of computers, they can continue their endeavors. The brothers and sisters input everything from library card **catalogs** to legal documents. Working only part-time, the monks are paid for each item that gets indexed; e.g., library **catalog** cards yield 15 to 20 cents per card. This allows the Scriptorium to offer a very reasonable archiving solution for businesses.

Not only do companies...a mapmaker in Lancaster, PA.

Time Life Medical patient education kits supply information to people who have been diagnosed with a serious illness or medical **condition**. Each kit **includes** a 30-minute diagnostic video created under the supervision of former U.S. Surgeon General Dr. C. Everett Koop. The video is accompanied by a...

19960729

12/6,K/49 (Item 3 from file: 275)

DIALOG(R)File 275: Gale Group Computer DB(TM)

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01804827 **Supplier Number: 17155740 (Use Format 7 Or 9 For FULL TEXT)**
Tools and utilities.(1995 Database Buyer's Guide and client/server
sourcebook)(Buyers Guide)

May 15, 1995

Word Count: 45154 Line Count: 03869

...Enhanced DBMS support for forward and reverse engineering reaches

several Xbase and SQL databases. Features table- and schema-level pre and post scripts, direct system **catalog** synchronization, multiple subject areas and stored displays, physical storage parameters (for Oracle and Sybase), stored procedures, and access to a full complement of Windows fonts...business systems to Access and other environments. Comes with more than 200 professionally designed tables, including Inventory, Accounts Payable, Cash Disbursements, Sales Commissions, Contact Management, **Purchase Orders**, Fixed Assets, Expense Budgeting, General Ledger, and Accounts Receivable. The structures include a full data dictionary and can be mixed and matched to design a...HP 9000 platforms.

Reader service #699.

DB-Delivery for DB2
Legent Corp., Herndon, VA
800-676-5468

A DB2 management product that includes: alter/migration, **catalog** query, table editing, DB2 utility execution, DASD management, plan analysis, security, and other general DB2 management services. Also includes an interface to Legent's DB2...

...based DB-Delivery for DB2. By combining DB-Delivery for DB2 with DB-Delivery for Windows, users achieve cooperative processing by down-loading the DB2 **catalog** on a workstation or LAN. DB-Delivery for Windows frees DBAs from constant reliance on a TSO interface to the DB2 **catalog**, allowing users to execute tasks from the PC for uploading and processing by the host-based DB-Delivery for DB2. Reader service #701.

DB/Explain...

...829-5800; 800-843-3970
Identifies and highlights differences among multiple versions of DB2 objects so DBAs can compare and synchronize them. Using the Compare **Catalog** architecture, it simultaneously processes DB2 objects from multiple sources: CASE tools, host DB2 systems, distributed DB2 systems, or any standard DDL-generating source, including DB...development times by more than 80 percent. Rocket Manager provides several performance features not found in native QMF, including tracking and monitoring of QMF performance, **catalog** management facilities for QMF objects, and both real-time and preemptive governing facilities to reduce the frequency and impact of runaway queries. Prices start at...

...service #740.
SQL Database Documenter
The Development Group for Advanced Tech. Inc., Upper Saddle River, NJ
201-825-9511
Produces automated database documentation from the **catalog**. Database objects are documented with SQL definitions, standard or

inferred-table entity-relationship diagrams, dependency graphs, and relationship graphs with associated structured English explanations.

A... applications using familiar high-level graphical development tools. Supports text-retrieval features with custom controls to display ranked results lists and view documents with search-**term** highlighting.

Includes debugging facilities, searchable online documentation, and online help. Incorporates two industry standards: Visual Basic and ODBC.

Features include SearchServer API for Visual Basic, online documentation... lets Motif developers build interactive tables into their applications. Ideal for applications that access tabular text information such as lists, databases, or spreadsheets, and for creating **catalogs** or forms. Provides more than 120 resources that allow for easy control of table attributes such as fonts, colors, 3D etching, labeling, and sizing.

Cells ...generation, lists of figures and tables cross-referencing, rotated text, and automatic component numbering. Customizable for any application that contains rapidly changing data, such as **catalogs**, directories, sales reports, investment portfolios, or personalized mailings. For use with any relational database that supports SQL or ASCII text files. Currently runs on Sun...

...914-354-8666

Creates a file containing the escape codes for laser printers (PCL4 and PCL5). Draw complex forms on the screen, such as medical, **tax**, government, and banking forms. Include in Visual Basic, C/C++, Clarion, CA-Clipper, and FoxPro. Both form and data from applications print as one pass...can disconnect from the database while continuing to work on the query result. Includes a report painter and offers features for DBAs such as shared **catalogs**, locked **catalogs**, query distribution, and query governors. Supports Oracle version 6 and Oracle7, Btrieve, Sybase, Microsoft SQL Server, Interbase, Informix, SQLBase, Rdb, Sybase System 10, and Paradox...with XDB-Link, it works as an online tool to access mainframe DB2 data directly from a PC, or it can store report objects in **catalog** tables in the same method as QMF. \$1200. Reader service #906.

Xtrieve Plus
Btrieve Technologies Inc., Austin, TX
512-794-1719
Interactive data-query system...

19950515

12/6/K/50 (Item 4 from file: 275)

DIALOG(R)File 275: Gale Group Computer DB(TM)

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01605455 Supplier Number: 14007293 (Use Format 7 Or 9 For FULL TEXT)
Xerox's DocuTech: 'print shop' all in one. (includes glossary of printing terms, and related articles on printing this issue using DocuTech and using a Xerox DocuTech service bureau to print a smaller job)

June 22 , 1993

Word Count: 13880 Line Count: 01061

Xerox's DocuTech: 'print shop' all in one. (includes glossary of printing terms, and related articles on printing this issue using DocuTech and using a Xerox DocuTech service bureau to print a smaller job)

...grades by a watermark and excellent writing surface. (Source: The Hammermill Paper Book.)

cover stock -- a heavyweight paper designed particularly for covers of

brochures and catalogs, business cards, posters, and similar applications. (Source: The Hammermill Paper Book.)

creep -- phenomenon in saddle-stitched jobs of the middle pages of a folded, printed...

...turning them over and returning the sheets through the process to print the second side).

index stock -- a sturdy white card stock for presentations, heavy-duty section dividers, posters, announcements, instruction cards or postal cards. (Source: Helpful Facts About Papers.)

offset -- a method of printing, usually involving the lithographic process, but...DocuTech automatically checks the toner level and the density along the path during printing. If it finds a problem, it makes adjustments to maintain consistency.

Duty cycle. The DocuTech is a heavy-duty machine, rated at up to 900,000 impressions per month, although we know a current customer

who has gotten 2.6 million in a month...has two standard paper trays, with two more optional, in comparison to the three standard trays on the 135.

The 90 is intended for lighter duty and offers only corner stapling. An offline thermal-type binder (the FastBack Binding System) is available

from the Powis Parker Co. Rumor has it that...doesn't put too much burden on the rip.

On the other hand, running a few copies of long documents does just the opposite. It taxes the rip heavily and leaves the printer waiting for work much of the time. It isn't that the rip is slow, but it can...to our dummy. They simply packed the printed booklets in a box and

sent them to us (two days later than agreed to in the purchase order, incidentally).

Dissatisfied with the result, we asked Xerox to re-output the job according to the dummy. A week later we got a revised batch...

19930622

12/6, K/51 (Item 5 from file: 275)

DIALOG(R)File 275: Gale Group Computer DB(TM)

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01522280 Supplier Number: 12335096 (Use Format 7 Or 9 For FULL TEXT)
MacUser minifinders: 1001 Macintosh products. (Buyers Guide)

August, 1992

Word Count: 77991 Line Count: 06173

...Simply Accounting has six ledgers and eight journals for handling the needs of most small-to-medium-sized businesses. Better Mac interface than most. Payroll-tax labels can't be modified, which forces you to subscribe to Bedford's yearly-update service. Version 1.03 reviewed. Version 1.3 shipping. Requires...

...part of an integrated accounting series provides state-of-the-art flexibility, integrity, and functionality. The easy-to-use module sets up detailed account information, **including** bank data, payment **terms**, and expense items for disbursements. Version 1.0 reviewed. Requires 68030 CPU or higher with 2 MB of RAM, System 6.03 or later, and... alone program but works best with the other modules. Has an icon bar for quick access to all parts of the program. It has special **tax-law**-updating capabilities a major consideration in a payroll program. Large, excellent manual. Requires Mac Plus or later, System 4.2 or later, and a hard-disk drive. \$695 (includes one free **tax** update). Peachtree Software, 1505 Pavilion Pl., Norcross, GA 30093. 800-247-3224 or 404-564-5800. (Apr '90) [MF#755]
Insight Expert Series
Insight is...

...Parsippany, NJ 07054. 800-322-6962 or 201-334-1154. (Apr '91)
[MF#757]

MacInTax
MacInTax is an excellent tool for preparing federal and state **tax** forms. Intuitive and easy to use, with all separate forms automatically interlinked for accurate recalculation. Accepts data from the leading personal-finance programs. Displays in WYSIWYG format and then

prints IRS-accepted forms on PostScript laser or dot-matrix printers. Many state-**tax**-form sets are also available. Provides logical Next Step feature, along with well-implemented Balloon Help (for System 7 users). Version 1991 reviewed. Requires Mac federal **taxes**, FICA, and Medicare costs). Includes HyperCard 2.1. Version 1.4 reviewed. Requires Mac Plus or later with 2 MB of RAM. \$249. Wetzel & Co...

...06851. 800-635-7849 or 203-846-2504. (Jan '92) [MF#764]
Quicken
Quicken is an excellent program for home budgets, cash-flow management, and **tax**-record keeping. Mimics your checkbook, so tracking finances is easy and intuitive. Provides detailed, customizable reports supporting **tax** deductions, expenses, and sources of income for U.S. federal and Canadian **tax** forms. Offers CheckFree electronic-bill-paying support. Lacks standard accounting safeguards and advanced features for serious business use. Version 3.0 reviewed. Requires Mac Plus...

...or 508-768-6100. (Feb '91) H '88 Eddy [MF#770]
WealthBuilder

This easy-to-use financial planner is a useful tool for knowledgeable long-term investors. **Includes** an updatable comprehensive securities database. Version 1.0 reviewed. Version 1.02 shipping. Requires Mac Plus or later, System 6.03 or later, and a...

...771]
WOS Fund Accounting
WOS Fund Accounting is a multiuser system designed to meet the needs of government and nonprofit agencies. Contains general-ledger, payroll, **purchase-order**/voucher, and accounts-receivable modules. Can handle multiple-fund accounting and multiple-year adjustments. Requires Mac Plus or later. \$4,995. Farallon Computing (Kansas office)...searching and identification. Allows limited search and sort criteria, and interface displays only six thumbnail images at once. Ideal for DTP users who need to **catalog** and access large graphics libraries. Supports TIFF, paint, EPS, PICT, or ImageStudio RIFF. Version 1.0 reviewed. Requires Mac II series or higher with 2...or 714-881-1200. (Nov '90) [MF# 800]

Canned Art: Clip Art for the Mac
Canned Art: Clip Art for the Mac is a printed **catalog** of more than ...Digit-Art is an overwhelming collection of EPS clip art that's available on floppy disk or on CD-ROM. Comes with a well-designed **catalog** of images. More than 20 volumes are available. Version 1.0 reviewed. Version 5.0 shipping. CD-ROM, \$799; single volume (disk), \$99; two volumes...619-660-0356. (Feb '92) [MF#1035]

Control Classic

This contact manager, based on 4th Dimension, is a simplified version of Control II, a heavy-duty system for sales-lead tracking, order entry, and invoicing. Control Classic concentrates on lead tracking and provides a clean interface, good automated planning, and a...FlowMaster is a flowcharting package that charts your ad dollars in print, TV, billboard, and other media. Analyzes costs/benefits of a campaign in innovative terms. Includes bar-chart and tabular output as well as a color-drawing environment for touching up charts. Version 2.01 reviewed. Version 2.5i shipping. Requires...in transferring text between HyperCard fields and text files. Can precisely filter and reformat comma- or tab-delimited text files from databases. Perfect for heavy-duty HyperCard users managing large databases. Version 2.0 reviewed. Version 2.11 shipping. Requires HyperCard 2.0. \$69. Cyan, Inc., P.O. Box 28096, Spokane...

19920800

12/6,K/52 (Item 6 from file: 275)
DIALOG(R)File 275: Gale Group Computer DB(TM)
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01464520 **Supplier Number: 11588474 (Use Format 7 Or 9 For FULL TEXT)**
Resolving differences.(between vendor and purchaser) (Strategies; includes related articles on steps to take, how to avoid problems, resources and using credit cards)

Dec , 1991

Word Count: 6143 Line Count: 00482

...tens of millions. (It will accept cases from individual consumers, however.) Unlike the BBB, where compliance is strictly voluntary, many corporate buyer contracts and business **purchase orders** include a standard, non-negotiable clause that any dispute between the parties must be submitted to binding arbitration under the auspices of the AAA. Some...the DMA is unable to obtain resolution for the consumer, it will, if such action is called for, assist in contacting the appropriate regulatory agency.

Law Enforcement

What we've discussed so far are honest disagreements that occasionally occur in every business. But what if you suspect that you're dealing...

...to companies urging them to settle with consumers. But the difference is that if voluntary compliance fails, and the bureau suspects a violation of state **law**, it has the legal authority to subpoena records, file

civil or even criminal charges, and even take the company to court.

If the company is strictly out of state, your consumer protection bureau will refer you to the bureau in that state. and if an investigation

determines that no state **laws** have been broken--but federal **statutes** may have been violated--the bureau may also refer you to the Federal Trade Commission (FTC) or the U.S. Post Office.

Both the FTC and the post office will investigate and prosecute any companies suspected of violating federal **law**. The two differ in that the post office has jurisdiction only over those transactions that in some way use the U.S. Mail: advertising flyers or **catalogs**, invoices and checks sent, items sent Parcel Post, etc. On the other hand, the FTC is empowered to investigate and take action against "any unfair...down in writing. Don't accept a salesperson's word about anything; make certain that whatever is promised is written somewhere on the sales receipt, **purchase order**, or a separate piece of paper. Ask that everything be described in as much detail as possible. The written statement must include: a list of...

...out, circle it, or pencil in whatever changes you wish. Then fax it back to the dealer for approval or negotiation.

If it's not **included** in the **terms** (usually on the back of the sales receipt or the **purchase order**), try to persuade the dealer to agree to some sort of binding arbitration. You may never have to avail yourself of arbitration services, but the...bring moral pressure upon companies to help settle problems.

Notes: Will refer to other state Bureaus of Consumer Protection if jurisdiction or clear violation of **law** lacking. Also refers to BBB, FTC, the post office, small claims courts, private attorneys, etc.

FEDERAL TRADE COMMISSION

Pennsylvania Ave. & 6th St. N.W. Washington, DC 20580 202-326-2000

Assistance: Will investigate and prosecute companies suspected to be in violation of federal **law**.

Notes: FTC rarely acts on single complaints or when clear violation of federal **law** lacking. Won't officially assist in achieving personal resolution or restitution.

UNITED STATES POSTAL SERVICE

475 W. L'Enfant Plaza S.W. Washington, DC 20260...

...6000

Assistance: Will investigate and prosecute any companies suspected of mail fraud.

Notes: Post office rarely acts on single complaints, where clear violation of federal **law** is lacking, or when the dollar amount involved is less than \$5,000. Will not assist in achieving personal resolution or restitution.

SMALL CLAIMS COURT...

19911200

12/6,K/53 (Item 7 from file: 275)
DIALOG(R)File 275: Gale Group Computer DB(TM)
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01439758 **Supplier Number:** 10957512 (Use Format 7 Or 9 For FULL TEXT)
MiniFinders. (buyer's guide to Apple Macintosh hardware and software) (buyers guide)

August, 1991

Word Count: 80288 **Line Count:** 06476

...Bedford Simply Accounting has six ledgers and eight journals to handle the needs of small- to medium-sized businesses. Better Mac interface than most. Payroll-**tax** labels can't be modified, forcing you to subscribe to Bedford's yearly update service. Version 1.03 reviewed. Version 1.2 shipping. Requires Mac...

...with the other modules. Has an icon bar for quick access to all parts of the program. The large manual is excellent. It has special **tax**-**law**-updating capabilities--a major consideration in a payroll program. Requires Mac Plus or later, System 4.2 or later, and a hard-disk drive. \$695 (includes one free **tax** update). Peachtree Software, 1505 Pavillion Place, Norcross, GA 30093. (800) 247-3224 or (404) 564-5800. (Apr '90)

Insight Expert Series 4 1/2
Insight...3
WOS Fund Accounting is a true multiuser system designed to meet the unique needs of government and nonprofit agencies. Contains general-ledger, payroll, purchase-order/**voucher**, and accounts-receivable modules. Can handle multiple fund accounting and multiple-year adjustments. Meets most federal reporting requirements. Requires Mac Plus or later. \$4,995...

...426-0854 or (701) 746-6801. (Apr '91)
MacInTax 1990 4 1/2
MacInTax is an excellent tool for preparing federal and some state tax **forms**. Intuitive and easy to use (with all separate forms automatically interlinked for accurate recalculation), it's consistently the best in its class. Accepts data from the leading personal-finance programs. Good built-in help. Prints IRS-accepted forms on all Laser-Writers and ImageWriters. Many state-tax-**form** sets are also

available. Version 1.4 reviewed. Requires Mac Plus or later. Federal, \$99; state, \$69 each. SoftView, Inc., 1721 Pacific Ave., Ste. 100...

...Box 907, Westport, CT 06881. (203) 222-9150. (Apr '90)

Quicken 5
Quicken is the best tool for home budgets, cash-flow management, and

tax-**record** keeping. Mimics your checkbook, so tracking your finances is easy and intuitive. Provides detailed reports supporting tax **deductions** and sources of income for Schedules A, B, C, D, and E; Forms 1040 and 2106; and Canadian tax **forms**. Version 1.0 reviewed. Version 1.5 shipping. Requires Mac 512Ke or later. \$59.95. Intuit, Inc.,

P.O. Box 3014, Menlo Park, CA 94026. (800) 624-8742 or (415) 322-0573. (Dec

'89) * '88 Eddy

TurboTax for the Macintosh
4

Turbo Tax is an excellent tool for preparing federal and certain state tax **forms**, but this first Mac incarnation hasn't outgrown its PC origins. It makes extensive use of intermediate worksheets

instead of accepting data directly into its tax **forms**. Separate forms and fields can be interlinked for automatic recalculation.

Accepts

data from the leading personal-finance programs. Excellent built-in help.

Prints IRS forms on LaserWriters and ImageWriters. Many state-tax-**form** sets are also available. Version 1.0 reviewed. \$89; state-form packages, \$49 each. Chipsoft, Inc., P.O. Box 85709, San Diego, CA 92186.

(800...Mountain View, CA 94039. (800) 344-8335 or (415) 961-4400. (Oct '90)

* '90 Eddy

PictureBook 5
PictureBook is a superb Scrapbook replacement. It catalogs your Scrapbook and lets you resize and/or crop anything that can be copied to the Clipboard. Powerful and has an excellent interface. Version

3.1...881-1200. (Nov '90)

Canned Art: Clip Art for the
Mac 4 1/2

Canned Art: Clip Art for the Mac is a printed catalog of more than 15,000 images available on-disk. Most images are reduced, so several fit on a page. Includes an excellent detailed index, saving you...Art is an overwhelming collection of EPS clip art that's available on floppy disk and

on CD-ROM. Comes with a well-designed catalog of images. Twenty volumes are available. Version 1.0 reviewed. Version 5.0 shipping.

Requires

a program that reads EPS files. CD-ROM, \$799; single volume...
...formats: 24-bit high-resolution color, 24-bit low-resolution color, and
8-bit black-and-white. Strikingly clear, high-quality images. Includes

printed catalog **and** a liberal rights policy. Excellent buy. Requires Mac II series, a color monitor, and a CD-ROM drive. \$149. discimagergy, 18

E. 16th., New York...is a flowcharting package that charts your ad dollars in print, TV, billboard, and other media. Analyzes costs/benefits of a campaign in innovative terms. **Includes** bar-chart and tabular output as well as a color-drawing environment for touching up charts. Version 2.01 reviewed. Version 2.02 shipping. \$795. Telmar...

19910800

12/6,K/54 (Item 1 from file: 636)

DIALOG(R)File 636: Gale Group Newsletter DB(TM)

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03898073 **Supplier Number:** 50064143 **(USE FORMAT 7 FOR FULLTEXT)**

BOOK ON THE WORLD WIDE WEB: ISSUES AND TRENDS

June 1, 1998

Word Count: 2647

...texts may be searched, scanned and manipulated in seconds ... finding special sections of text, doing linguistic analysis and being able to "cut and paste" for **incorporation** in **term** papers or other works, is much easier in the electronic world. In an electronically aggregated collection it will also be possible to search across entire...

...Internet (e.g. Amazon.com); new aggregation contenders (e.g. Xerox, InfoMaster/Netlibrary); or libraries (who will purchase electronic books from many sources and will "**catalog**" them with hotlinks and offer this aggregated collection to their community of users. As with most large markets, all of the above types of aggregation...in Boulder, Colorado by InfoMaster, Inc. Its genesis was a product called BankersFYI.com which was a project to put many of the banking rules, **regulations** and works on the Internet for the banking and regulatory communities. In this process, InfoMaster developed a set of software tools which were very strong...

...have licensed Publiotech software from Electric Press for the web component, featuring registration and hosting of books, book searching and page-by-page browsing, a **shopping cart**, online transactions, copyright clearing, and seamless integration with Xerox's on demand printing facilities. Book In Time will be marketed jointly by Xerox and Electric...

19980601

12/6,K/55 (Item 1 from file: 624)
DIALOG(R)File 624: McGraw-Hill Publications
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0025586
Manufacturers' Literature
December 18, 1986
WORD COUNT: 3,736

TEXT:

... data sheets detail specifications for various applications of galvanizing, including bridge rails, fences and structural steel.
DUNCAN
GALVANIZING CO. 188

Architectural hardwood door/Full-color **catalog** describes architectural hardwood doors. Benefits of seven-ply vs. five-ply construction are described and illustrations of various wood cuts and finishes are given. Products...
...mechanism as applied to water-containment structures, subgrade dry space requirements, and concrete preservation and protection.
VANDEX/CRESCENT
KINGSLEY INC. 196

Anchoring systems/Twenty-page **catalog** covers a wide range of anchoring bolts. Includes a special anchoring system that gives high security in dynamic and load-reversal applications even in cracked... systems. Load table instructions are given, along with tables at 115 and 125%, supported with standard detailing and suggested bracing. TRUTRUS INC.
206

Underbridge ducts/**Catalog** incorporates technological data

and serves as a comprehensive reference source for both single and multiple underbridge duct designs. Products featured include full line of fiberglass

...

... of access components are available. They can be placed in a pattern predetermined by the building designer. INRYCO INC. 214

Electromechanical products/Fifty-four-page **catalog** of electromechanical products gives descriptions of almost 500 models and their options. The **catalog** provides detailed specifications, a selection guide that helps in determining control needs and a glossary of electromechanical **terms**. Products **include** pressure and temperature switches and indicating temperature controls. UNITED ELECTRIC CONTROLS CO. 215

Sludge conditioning/Sludge dewatering program, designed to reduce costs by maximizing cake from 1,100 to 4,500 cfm. UNITED AIR SPECIALISTS INC. 225

Valves, actuators/Condensed **catalog** describes the manufacturer's line of valve products, which includes industrial ball valves, trunnion-mounted pipeline ball valves, high-performance butterfly valves, diaphragm valves, plug...

...and expandable sizes to produce monolithic bases or riser sections using tongue-and-groove or flat joints. QUINN MACHINE & FOUNDRY CORP. 241

Contractor pumps/Composite **catalog** pictures and describes 26 pump models for contractors. Included are self-priming centrifugal trash and dewatering models; submersible models; high-pressure models; diaphragm models; power take-off models; handy pumps; and fuel-handling models. The **catalog** contains information on capacities of all models as well as data on discharge sizes. THE GORMAN-RUPP CO. 242

Ladders/This 24-page brochure features...

Compressors and blowers/Four-color, 11-page brochure provides information on complete lines of heavy-**duty** compressors, double-acting, water and air-cooled models to 300 hp, available in lubricated or oil-free configurations; oil-free rotary screw compressors, two-stage...

... flow into primary crushers at mines and quarries. The brochure includes pictures of typical installations plus technical information on the selection of standard and heavy-**duty** boom systems. This information ...000-ft-lb class hydraulic breakers to mix and match with booms are also included. TELEDYNE CM PRODUCTS INC. 251

Anchoring, drilling systems/Anchoring systems **catalog** features a detailed applications grid outlining product sizes, appropriate usage and official approvals. Selection guides for all this company's drills and chiselling tools and for a variety of drill bits and chisels are included as well. The manufacturer's **catalog** includes full-color illustrations. HILTI INC. 252

Compressors/These 600-to-900-cfm portable air compressors are designed for general construction and sandblasting applications. They feature oil-flooded air ends and Cummins L10 engines rated for continuous service at 1,800 rpm. The compressors have heavy-**duty** running gears designed for highway speeds up to 50 mph. All components can be reached through large access doors. INGERSOLL-RAND CO. 253

Miscellaneous

Flotation...

... seminars, conferences and workshops covering the latest techniques of roofing product applications using manufacturer's products. OWENS CORNING FIBERGLAS 255

In-situ measurements/Twelve-page **catalogue** describes the manufacturing and in-situ measurement program of this company. Descriptions are given of the many techniques employed to establish the in-situ engineering... a common project database, definition and management of subprojects. SIGMA DESIGN INC. 268

Integrated software/Software packages handle such critical management functions as job scheduling, **purchase order** generation and reconciliation, invoice payment, job cost summarization and reporting, all within one system. The new packages, under the MS/PC-DOS operating system, run...

12/6,K/56 (Item 1 from file: 635)
DIALOG(R)File 635: Business Dateline(R)
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0698581 96-55926
International Trade Roundtable

Publication Date: 960429

Word Count: 5,728

Publication Date: 960429

Text:

...Poltenson: Jim brings up an interesting point when he talks about the World Wide Web. Is that changing the way people are doing business in **terms of importing and exporting?**

Bisson: I've noticed that of late we have received a lot more requests to send our information, be it in the form...

...business being done on the Web.

Terrinoni: I think that the Internet is a perfect vehicle for manufacturers, because many of their printed materials like **catalogs** don't have a time phase [restricted selling period] like a retailer. Many manufacturers can have the same **catalog** for over a year and just

change the price sheet. So for a manufacturer to have a home page, maintain it, and maintain the interest of [people], it's not critical to change it often, and they can have much more documented material on it. They can have their whole **catalog** in a series of pages and have to update it only a couple times a year. I think the key to the whole thing is...Ron uses at BS&K may be a thing of the past?

Berger: There's an interesting point. Technology is way out ahead of the **law** in that regard, because we have not yet developed rules of **law** dealing with electronic orders and electronic contracts. In the old days, when you used to submit a written **purchase order** and get back a written acknowledgment, our state statutes governed when a contract was formed and what happened if you had inconsistent terms in it. Now we're dealing with electronic contracts, and we do not have a body of **law** yet developed to deal with inconsistent terms or if you have even formed a contract by the exchange of electronic communication. So it's a developing body of **law**, and I'm sure that in 10 years we're going to see a number of court cases dealing with whether an electronic communication can...
...two separate disciplines: the purchase discipline and the payment discipline. If a manufacturer in Central New York is selling to WalMart, Walmart will initiate a **purchase order** to the manufacturer. He will ship and invoice over that same electronic system, and he will receive payment back electronically, so that no paper even...

...know where the education would come from to remove this fear from businesses in general. Will the U.S government do it? The state government?
Law firms? Banks? I don't know.

Protecting intellectual property

Poltenson: Since you've talked of fear and encryption and the Web and electronics, it brings...in Latin America--Brazil and Chile are shining stars down there, and Ecuador is, too. Venezuela is not doing well right now. But, in general **terms**, business is flowing, **imports** are increasing, and everything is done very quietly. I think in this country in general terms we turn to the media, the press. If the...gold mine, where they are making a good effort to appease the international community with respect to some of the problems with the intellectual property **laws**.

So they seem to be on their way up. Other countries like Zimbabwe may be of interest, but there may be high risk because of...

12/6/K57 (Item 1 from file: 638)
DIALOG(R)File 638: Newsday/New York Newsday
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09344005

PLUGGED IN: THE 1997 BUYING GUIDE / The Virtual Mall Click, Pay / Web shoppers may spend more than \$1 billion this season.

Wednesday December 10, 1997

Word Count: 1,414

Typically these retail sites offer a scaled-down version of their catalog online, with **shopping cart** features that allow you to browse around and select multiple items before heading for the virtual cash register. More sophisticated online operations such as Lands

...

...secret from the merchant.

-- Use the same precautions you would when buying by mail order. Check out the retailer before placing an order. Know the **terms** of the sale, **including** policies on returns. Order with plastic so the credit card company can intervene if you run into problems with the merchant. Even if your credit card number is stolen, over the Internet or otherwise, most banks will waive the fraudulent charges. At worst, federal **law** limits your liability to \$50.

-- If you're dealing with an unknown company, place a small order first.

Keep in mind that scam artists tend...

...to pick up used computer equipment and other items, but before you bid or buy know who's selling the item and find out the **terms** of the sale, **including** return policies.

-- Be leery of offers that seem too good to be true. Web pages and e-mail ads that promise merchandise at unbelievably low...to the consumer.

Amazon Books (www.amazon.com) -- Billed as Earth's Biggest Bookstore, Amazon offers over 2.5 million book titles in their searchable **catalog**. You can save from 20 percent to 40 percent on most titles, as compared to regular bookstore prices.

971210

12/6/K/58 (Item 1 from file: 704)
DIALOG(R)File 704: (Portland)The Oregonian
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10597281

SAFE SHOPPING ONLINE

Thursday, April 6, 2000

Word Count: 312

Text:

SAFE SHOPPING ONLINE

* Shop with companies you know. If you're not familiar with a merchant, ask for a paper **catalog** or brochure to get a better idea of their merchandise and services. Also, determine the company's refund and return policies before you place your...

...credit or charge card. If you pay by credit or charge card online, your transaction is protected by the Fair Credit Billing Act. This federal law gives you the right to dispute charges under certain circumstances and temporarily withhold payment while the creditor is investigating them.

* Keep a record. Print a copy of your **purchase order** and confirmation number for your records. Federal rules cover orders made via the Internet. Unless stated otherwise, merchandise must be delivered within 30 days, and...

...check the seller's feedback rating.

* Do your homework. Be sure you understand what you're bidding on, its relative value, and all terms and **conditions** of the sale, including the seller's return policies and who pays for shipping.

* Evaluate your payment options. If possible, use a credit card. It offers the most protection...

000406

12/6,K/59 (Item 1 from file: 47)

DIALOG(R)File 47: Gale Group Magazine DB(TM)

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06006549 **Supplier Number:** 70368452 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Interlibrary Loan and Resource Sharing Products: An Overview of Current Features and Functionality.

Nov , 2000

Word Count: 80775 **Line Count:** 06653

...communication capabilities into their new, comprehensive ILL applications. Other vendors are offering products that support patron-initiated ordering from either a physical or virtual union **catalog**. New products to manage internal files and procedures of traditional, mediated ILL have also been introduced or upgraded significantly. Marketing of these products by some...

...and other nonreturnables.

Resource sharing is used in this publication to characterize a circulation-based process that permits patrons to search physical or virtual union **catalogs** and place circulation holds on items held by libraries in the consortium.

Mediated ILL characterizes the process handled by ILL staff. Unmediated borrowing indicates the...

...or do not need the complex functionality required by large-volume operations. Products in this category include TLC (Total Library Computerization), KLAS, Winnebago Spectrum Union **Catalog**, Mandarin M3, and Web Collection Plus.

Other products are designed to support only one or two aspects of the borrowing process, for example, WebZap, CARLWeb...relational database management system), which required a separate license that can be obtained through Ex Libris at purchase. ALEPH does not require a physical union **catalog**. Depending on the installation, the archiving function within Oracle can be activated, thus making these features available.

Customers may choose to run one or more...locally customized, and may vary depending on individual staff workstation, if desired.

Copyright Compliance
The ILL module tracks compliance with the U.S. copyright law and the CONTU Guidelines. It also supports copyright compliance the United Kingdom.

Fines and Fees

Patron fines and replacement bills are handled using the ALEPH circulation...Reject Request processing.

The ability of the product to mark requests that have been printed will be in the June 2001 release.

An integrated catalog **search** tool is incorporated into the ALEPH ILL module to verify availability and to attach call numbers. Pick slips may be individually or batch generated. Staff...

...Sales Executive

Phone: 303 758 3030 x 109

E-mail: jthomas@carl.org

Web: www.carl.org

CARLWeb is the Web-based public access catalog **of** the CARL System. Interlibrary loan is facilitated in two ways: System Holds and CARLWeb ILL Request.

System Holds ...by other libraries; it does not support photocopy requests. In a consortium configuration, the Patron-Placed Hold button, when used in a physical union catalog, **can** generate System Holds, eliminating the need to generate mediated ILL requests for consortium partners.

The CARLWeb ILL Request permits patrons to submit loan requests and

...

...optional form for unverified requests, where the patron fills in what is known of author, title, and so on, rather than searching a library catalog

on the CARL Network or a Z39.50 server.

The CARLWeb ILL Request is designed to provide an interface for patrons to submit borrowing requests to...

...into the messaging system of choice.

CARLWeb ILL Request allows patrons of libraries on the CARL System to file requests for materials in other catalogs **to** the ILL staff of their home library.

As a Z39.50 client for virtual union catalogs, **CARLWeb** has been tested with DRA, Dynix, Endeavor, Geac, III, Melvyl, and NOTIS.

Neither product is designed to interact with Ariel, nor do they interface with...

...databases on the CARL Network or databases behind Z39.50 servers. Search

results are displayed just like search results from the patron's home catalog. **Results** are not de-duped.

If a library on the CARL network is using the Serials module, its serial holdings are displayed at the summary or...

...readers using devices that speak the contents of HTML.

System Architecture

System Holds are placed by patrons using client/server PAC software (Everybody's Catalog) **or** Web-based PAC software (CARLWeb). Client

software runs on Windows PCs, Web server software runs on Sun servers; both windows clients and the Web server...Internet Explorer 3.x and higher.

The CARL integrated library system uses the Compaq Enscribe database management system. In consortium configurations, a physical union catalog is required to support intraconsortium ILL by means of the System Holds function. In any configuration, a virtual union catalog enabled by CARLWeb Z39.50 client allows patron-initiated ILL requests.

In general IP connectivity is established between all users and all servers.

No third-party...

...to system administrators and the "CARLWeb Setup" is provided to ILL staff.

Context-sensitive patron help is provided with CARLWeb and with Everybody's Catalog. **Customers** may convert and customize the content of these files to create handouts for patrons.

CARL training staff train core library staff, who then train public

...

...unmediated borrowing functions are supported in two different ways. For unmediated borrowing within a consortium, libraries use System Holds. Patrons search a physical union catalog and place holds on items they are allowed to borrow from other libraries in the consortium. Staff can use the Circulation module to input mediated ILL requests by patrons.

The CARLWeb ILL Request supports mediated borrowing. Patrons search any CARL Network catalog or any configured Z39.50 catalog, and forward personal data with bibliographic data in the form of an ILL request e-mail to designated library staff.

Authentication and Authorization
System Holds authenticate...

...communicate with the patron.
Copyright Compliance

Neither the System Holds nor the CARLWeb ILL Request is designed to track compliance with the U.S. copyright law, the CONTU Guidelines, or copyright compliance in other countries.

Fines and Fees
System Holds handles fines and replacement bills; CARLWeb ILL Request is not designed to...status) information can be printed using any printer configured with the browser.

The Request Process: Creating Patron Requests
If patrons search their home library catalog, or a physical union catalog in a consortium, the system offers a Hold button that leads to a prompt for patron identification, configurable patron authentication data, and a prompt for pickup location before filing the

hold.

If patrons search a database that is not their home library catalog **or** a physical union catalog in a consortium, the system offers a Request ILL button that leads to a form requesting patron contact data and a prompt for pickup location before...

...copy of a journal article using a form designed by the library. Many CARL libraries provide bridges from their CARLWeb OPAC (online public access catalog) to the UnCover, offering patrons an alternative method to order documents from one commercial document delivery service.

The Request Process: Searching, Editing, and Sending
For a CARLWeb ILL Request, borrowing staff receive new requests via e-mail, search their home catalog and other catalogs, edit as needed, and forward request as appropriate. Requests may be sent to commercial document suppliers if desired.

For System Holds, titles can be searched by...
...select or recommend potential lenders. A CARLWeb ILL Request does allow an implicit selection in that the ILL request includes the name of the catalog **that** the patron searched, but library staff can override this selection and forward the request to any library.

System Holds automatically pages appropriate member libraries of...

Internet Explorer 4.0 and higher.

One copy of the Clio software is required for each installation. Clio does not require a physical union catalog and is networkable.

Clio incorporates many third-party components: MS Access, EasyMail mail clients from Quiksoft, and Cold Fusion. No separate licenses are required.

There is...

...be used.

Target Audience

The target audience for Clio includes small to large academic or research libraries and public libraries.

Current customers include academic, law, **public**, and state libraries. Selected customers include the California Academy of Sciences, Washington State University, Colorado State University, University of Denver Law, **Texas** State Library, Dallas Public Library, and the Louisville Public Library. A complete list of customer may be found at <http://cliosoftware.com>.

Clio is installed...
...next release will include the capability of e-mailing overdue notices to patrons.

Copyright Compliance

Clio tracks copyright compliance with the U.S. copyright law and the CONTU Guidelines. It does not track copyright compliance for other countries.

Fines and Fees

Clio does not handle fines or replacement bills.

Mediated and...holdings to route request to appropriate lenders. The process of selecting potential lenders occurs outside Clio. Borrowing staff search OCLC, a lender's online catalog, or search other print or online tools to identify potential lenders. Library staff, not the Clio software, would balance the number of requests (load leveling) sent...elements of what is printed on requests. Clio does not mark requests that have been printed but not answered. Lending staff then check their catalog, sort requests, and retrieve material. Lending staff send requests for material in branch or departmental libraries using local procedures; Clio does not have the ability to...

...send loan and photocopy requests to librarians to other DOCLINE users. It interacts with PubMed, NLM's citation database, and LOCATORplus, NLM's online catalog. DOCLINE accesses more than 1.2 million journal holdings for more than 3,000 libraries. This automatic link eliminates the need to find location information for...cold fusion on Unix servers maintained by NLM.

DOCLINE is designed to interface with PubMed, NLM's citation database, and LOCATORplus (NLM's online catalog) for bibliographic searching.

The DOCLINE staff interface is available on the Web; a Windows interface is not available. Netscape 4.x and Internet Explorer--4.x...

...available in the Borrow component. The first two involve searching and transferring citations from PubMed, NLM's citation database, or LOCATORplus, NLM's online catalog. The third and fourth options use the unique key feature which eliminates the need for the user to search PubMed or LOCATORplus. Users may enter the...patrons that materials have arrived or of overdue materials.

Copyright Compliance
DOCLINE is not designed to track copyright compliance with the U.S. copyright law, the CONTU Guidelines, or with copyright compliance requirements in other countries.

Fines and Fees
DOCLINE is not designed to handle fines or replacement bills. Mediated and...by ILL staff. The Z39.50 search result is displayed using RLG's Eureka interface. Search results are de-duped if using a union catalog that de-dupes (for example, RLG's Union Catalog, OCLC). The database searched will determine if serial and multivolume holdings are displayed at the summary or detailed level.

The ILL Manager supports the full range...

...any overhead.
Target Audience
The ILL Manager is aimed at small to large academic, public, and

special libraries.

Current customers include Dartmouth College, Harvard Law School, Columbia University Teachers College, Rutgers University, Princeton University Biology, and the University of Pennsylvania libraries.

The ILL Manager is marketed outside the United States, primarily...

...can select the status changes it wishes to notify the patron.

Copyright Compliance

The ILL Manager tracks copyright compliance with the U.S. copyright law and CONTU Guidelines. Customers can enter values for copyright compliance required by other countries. No additional reporting is currently provided for non-U.S. copyright compliance...that have been printed but not answered are marked by the ILL Manager.

Call numbers are supplied if data comes from the RLG Union Catalog.

The time to process a lending request varies depending on workflow, but the actual time spent interacting with the ILL Manager is seconds per request, especially...DOCLINE. ILLiad must be networked. The software uses standard TCP/IP protocols to send and receive data. ILLiad does not require a physical union catalog.

The patron and staff interface is available through the Web. Netscape, Internet Explorer, and all modern Web browsers are supported, including text browsers.

ILLiad stores all...notification. Customers are e-mailed overdue notices at intervals decided by the customer.

Copyright Compliance

ILLiad tracks copyright compliance with the U.S. copyright law and the CONTU guidelines. It does not support copyright compliance for other countries.

Fines and Fees

ILLiad can handle fines but not replacement bills.

Meditated and...

...edit their own records.

ILLiad does not include a library policy directory. ILLiad can interface with other systems, however, including live online public access catalogs (OPAC) links, imported OPAC information, or modern authentication servers such as Lightweight Directory Access Protocol (LDAP).

Printing

ILLiad uses the standard Windows printer drivers to allow...systems. Using the Add Request menu, lending staff can enter requests received via mail or fax.

Lending staff search each request in the online catalog to determine availability. Depending on the online catalog, most searching can be automated. With many OPACs, the process is as simple as running a search macro to find the requested item. Other OPACs require...

library that only borrows or lends. Impact/ISO ILL supports loan requests, photocopy requests. Bibliographic and location information can be captured from an external catalog.

Impact/ISO ILL eliminates the need for paper files. It manages routing of requests to libraries by the means and in the format appropriate for the...

...database by the system administrator.

Creating and Accessing Records

Impact/ISO ILL manages requests. Bibliographic and location information can be captured from an external catalog.

Impact/ISO ILL does not limit the number of requests that can be handled by the system. Any limits may be a result of available space...

...server.

The patron interface is Web-based. Netscape 4.0 or higher and Internet Explorer 4.0 or higher are supported.

A physical union catalog **is** not required as a component of Impact/ISO ILL.

Impact/ISO ILL can be installed on a network. Since the interface is Web-based, the...time the request is initiated whether the request is for a loan or copy. Bibliographic and location information can be captured from an external catalog. The patron needs to supply his identification and any other information that is not part of the bibliographic record.

Authentication and Authorization

Impact/ISO ILL authenticates...

...the request cannot be filled requires initiation by the borrowing staff.

Copyright Compliance

Impact/ISO ILL tracks copyright compliance with the U.S. copyright law **and** the CONTU Guidelines. Copyright tracking categories that may be required by other countries can be configured by the library.

Fines and Fees

Impact/ISO ILL...

...in the patron request form is barcode.

The Request Process: Searching, Editing, and Sending

Staff retrieve an incoming patron request and search the local catalog **and** other sources. Staff can select the lender to which the request should be sent. The request is automatically sent in the appropriate message format and...establishes its lending workflow is a local matter. Staff may choose to produce pick lists from the new requests and then search the local catalog **and** retrieve items, or they may choose to search the catalog **before** producing the pick list. A staff member enters the call number into each request after searching the catalog. The elements included on a pick slip are customizable but

not through the staff interface. Pick slips cannot be printed in a locally defined order.

Impact...

...655-6200

E-mail: sandy@iii.com

Web: www.iii.com

INN-Reach is a component of an integrated library system plus a union catalog. INN-Reach supports a patron-initiated circulation model among libraries in the consortium using the product. INN-Reach is integrated into the circulation module of Innovative but individual libraries are given options that can be implemented either by the consortium as a whole or by individual sites. Lending regulations **and** policies can be customized in accordance with the consortial policies.

INN-Reach does not make use of forms, except for entry of patron verification data...

...Customers use their own integrated library system hardware. Telecommunication uses network connections. The base purchase price includes all functionality. Some options for the central catalog **do** not impact the resource-sharing capabilities. INN-Reach systems by definition are group purchases; Innovative Interfaces did not indicate whether discounts are available.

Innovative Interfaces...

...has its own report generator. In addition, data can be output as delimited files for use in other products.

Support of Standards

The union catalog **may** be searched using Z39.50. Patron requests and verification use a Web interface or telnet interface. Serial holdings are displayed at the summary level. Multivolume...

...by scanning. Voice recognition will likely be introduced into the circulation functions in 2001.

System Architecture

INN-Reach is based on a central union catalog **that** contains a merged database of bibliographic records with holding data down to the current circulation status. The union catalog **is** updated in real time as changes occur on a local system, including changes to circulation

status. Patrons may search the union catalog **and** place requests. Patrons are verified on their library's integrated library system in real

time. There is no central patron database.

The union catalog **determines** the lender based on item availability and load balancing. Once a lender is determined, the union catalog **sends** messages to the corresponding systems (patron and item), which results in temporary records being constructed on the local systems. The local systems then page and...

...based on software within the ILS system. If a lender cannot supply the

requested item, a cancellation by that lender results in the union catalog

attempting to find another lender.

INN-Reach also allows patrons to be physically present at another library and to borrow from that remote library using the...renewals or returns, are handled the same whether the patron directly checks out the

item or whether the patron requests it from the union catalog.

INN-Reach requires a physical union catalog. INN-Reach uses one server for the union catalog. **Each** participating library runs its own server.

The union catalog **and** circulation functions can be accessed via a Web or telnet interface. Web access is via Netscape 3.0 and higher or

Internet Explorer 4.0 or higher.

The union catalog **has** its own database as do each participating ILS system. Requests are tracked using temporary records retained on the local integrated library system until a transaction...

...staff.

BORROWING FUNCTIONALITY

INN-Reach includes a borrowing component. Patrons can borrow from another library in two main ways:

- * Locate item on the union catalog **and** initiate a request
- * Be on-site at another library and borrow directly using the

patron record in their own library system.

Both types of borrowing...Copyright Compliance

INN-Reach is not designed to handle photocopy requests, and as such, does not track copyright compliance with the U.S. copyright law **or** the CONTU Guidelines.

Fines and Fees

INN-Reach handles fines and replacement bills in the same way as replacement bills for circulation items. If the...

...or sent by e-mail. Reports can be printed on local or networked printers.

The Request Process: Creating Patron Requests

Patron search the union catalog, **click** a request, select from a pull-down menu to select their home library, and complete the identification information required by the library, including name; unique

...

...Otherwise the system selects an available item for the patron. Each request is placed individually.

Patrons are limited to requesting items in the union catalog; **they** are not able to input requests manually for titles not found as a result of the search of the union catalog.

INN-Reach is designed as a resource-sharing tool for circulating items. It handles books, audiovisual materials, and any other materials that circulate. It is not...

...although serials holdings are represented and can be a source of determining lender strings for other ILL products.

Because the patron searches a union catalog **and** identifies a specific item or visits a member library, INN-Reach does not use forms. INN-Reach uses existing patron records; it does not capture...Reach.

LENDING FUNCTIONALITY
INN-Reach supports an unmediated lending model. Items may be loaned to patrons either based on requests received from the union catalog **or** when patrons are present at the library. In both cases, a temporary patron record is constructed automatically based on data received during the patron verification...library cancels any request it cannot fulfill. A cancellation reason may be specified. INN-Reach software sends a cancelled request back to the union catalog **to** determine if any other lenders are available. If no lenders are available, the cancellation is sent to the patron's system, which then changes the...

...and as a component of an integrated library system. It is designed to support a consortial model of ILL where libraries share the same catalog **or** a Z39.50 model of ILL where resource discovery is handled by searches of Z39.50 catalogs. **Customers** may choose how they will implement the product. Library*Request manages borrowing and lending and can be used by libraries that only borrow or lend...database, which can be located anywhere customers choose: at their own library, at a central location, or at The Library Corp.

A physical union catalog **is** not a required component of Library*Request.

All components of Library*Request are fully browser accessible. The system can be made available via a LAN...

...first quarter of 2001.

Patrons can see the status of all their requests, including completed ones. Patrons walk up to the online public access catalog **and** click the Patron Request button. This opens another browser window that prompts the patron to log in. On authentication, the patron is presented with a...

...ILL systems and to the patron's circulation system.

Copyright Compliance
Library*Request does not currently track copyright compliance with the U.S. copyright law **or** with the CONTU guidelines. TLC will add this functionality in the first quarter of 2001. Library*Request supports copyright compliance for other countries only in...are searchable by Group Qualifier, ClientInfo, Internal Tracking number, Partner Institution, Current State of Transaction, and ItemInfo.

In the non-Z39.50 model, Union Catalog **created** by TLC or a part of TLC's integrated library system only, Library*Request does not allow one person to request the same item more...system from any browser.

Patrons can see the status of all their requests, including completed ones.

The patron walks up to the public access catalog **and** clicks the Patron Request button. This opens another browser window that prompts the patron to log in. On authentication, the patron is presented with a...be added to the request by changing the item information. Call numbers can be located by direct attachment to certain OPACs (online public access catalog), **or** via a Z39.50 search.

Library*Request does not support forwarding requests to a branch or departmental library. Lending staff would use local procedures (phone...).

...Library. Solution and PAC2000, The Library Corp. ILS products. It also integrates with other PACs via Z39.50 and will implement with other online catalogs **when** the NCIP is implemented.

When the item has been returned, lending staff locate the item by scanning the shipping label/pick slip. The administrator may...

...to process requests, including searching the local OPAC and placing a hold if the item is locally owned, or turning a request into a purchase order. **Methods** of acquiring from ILL partners include sending ISO-compliant requests to intermediaries such as OCLC or to individual libraries. ILL requests may be sent as...and staff authorizations.

The ILS system server may be configured for one or multiple libraries.

A Web interface is available for both the union catalog **and** circulation functions. A telnet interface is also available and can be used interchangeably on the same system. Innovative supports two browsers: Netscape 3.0 or...

...ILL records form a database within the ILS server. Patron records and suppliers records are contained within the circulation patron database.

A physical union catalog **is** not required as a component of the ILL module.

The ILL Module is accessible by patrons or staff primarily via network connections.

Requests can be...

...Michigan State University; Tulsa City-County Library System; St. Louis County Library; Springfield-Greene (Mo.) County Library; and the University of Arkansas Little Rock Law **Library**.

The Innovative system and ILL module is sold outside the United

States.

The Innovative user group is open to all users of Innovative products and...These notices are sent in same manner as other circulation notices.

Copyright Compliance

The ILL module tracks copyright compliance with the U.S. copyright law **and** the CONTU Guidelines. It also supports copyright compliance for the United Kingdom and the British Library Document Supply Center. Copyright statements displayed to a patron...

...requests if different suppliers are used. Requests may be sent to suppliers either in batches or individually. Requests may be searched on the local catalog **or** other catalogs **before** processing.

Requests may be sent to an ILL supplier including commercial document suppliers, may be turned into a purchase **order**, **or** may be cancelled. The library has various methods of communicating with suppliers,

including the ISO ILL Protocol, e-mail, ARTE-mail, or printed letter.

Staff...KLAS (Keystone Library Automation System) is a component of an integrated library system that supports patron placed holds and consortial borrowing within a union catalog **environment**. The functionality is much closer to remote circulation than traditional, mediated interlibrary loan. Customers have their catalogs **combined** into a union catalog **for** patron access through the Web.

KLAS can also support ILL among certain cooperating subgroups within the larger group represented in the union catalog. **When** patrons find the needed material in the catalog **they** mark it as requested. Processing of patron requests is automatic throughout the participating libraries. If the material is available at the patron's primary library...

...group of libraries, it eliminates the need for paper requests and traditional ILL procedures, but if the item is not available within the union catalog, **the** patron submits a traditional ILL request. The ability to produce electronic or paper requests for items not in the union

catalog **is** planned for a Version 7.0 release in 2002.

Libraries using KLAS are both requesters and suppliers; they do not assume just one role. That...

...requests. Virtually all the fields on the request are searchable.

Customization

Libraries can customize the user interface, but the requesting functionality within the union catalog **is** not customizable.

Interface With External Systems

KLAS is not designed to interact with OCLC, RLIN, DOCLINE, or Ariel.

Interaction with ISO ILL Protocol systems is planned for a future release.

KLAS requires a physical union catalog.

KLAS is not designed to support the ordering of photocopies,

and thus does not interface with commercial document delivery suppliers.

Patron-Initiated Requesting
KLAS permits patrons...

...manipulation of statistics.
KLAS can link to local accounting systems using SQL or ODBC.
Support of Standards
KLAS supports Z39.50 searching of remote catalogs, **but** if patron find an item, they must contact the ILL department and complete an ILL request form; a circulation hold cannot be placed ...to other libraries' patrons. Keystone is working with groups to extend the borrowing to libraries using the same circulation system but with different union catalogs.

Installed sites include the Florida Bureau of Braille and Talking Book Library Services, Indiana Educational Resource Center, Caldwell Community College and Technical Institute (Hudson, N.C...).

...Train-the-trainer is used when appropriate.

BORROWING FUNCTIONALITY
KLAS supports the requesting of books and other returnables from libraries sharing the same union catalog. **The** design supports a remote circulation model rather than a mediated ILL model. KLAS is not designed to support the ordering of journal articles or other...

...system prints return address labels and return slips. Both are customizable.

The Request Process: Creating Patron Requests
Patrons find an item in the union catalog **using** a character-based search. They are next asked for an ID and password, which validates them as eligible to request items from another library. As they search the union catalog **they** put requests into a shopping cart (a list) and can delete requests before submitted them. The user interface for this ordering can be customized. The system does not support the ordering of...
...an individual patron is unlimited unless the customer changes the default for the patron.

If patron cannot find the needed item in the union catalog, **they** contact the ILL department to initiate an ILL request using whatever methods are used by the library.

The Request Process: Searching, Editing, and Sending
Patrons...submit address changes, view items charged to them, and so on.

LENDING FUNCTIONALITY
KLAS supports the remote circulation model among libraries sharing a union catalog. **Requested** items are printed nightly, retrieved from the stacks, and mailed to the patron's library. Because most requests are filled within 24 hours, there is...

...could not be found, there is no need to handle status checks.

Overdues and recalls for items borrowed from another library in the union catalog **are** handled the same as overdues and recalls from the patron's local library.

The Lending Process: Unfilled Requests

Because circulation status is available, few requests...

...is only available as an option for customers using the Mandarin M3 software. Mandarin M3's ILL module can be used in centralized union catalog **configurations**, in virtual (confederated) union catalogs, or in individual libraries that may create ad-hoc interlibrary loan arrangements. The software can be used on PC-based servers, and can be accessed, via...

...Interface With External Systems

The ILL module is not designed to interface with OCLC, RLIN, or DOCLINE.

Customers can share a common, central union catalog **that** provides integrated, online catalog, **circulation**, and management functions. Individual libraries can scope queries to their local collections, or expand those queries to include all member libraries. Library staff or patrons...

...to interface with Ariel, or local accounting systems.

This system offers the ability to eliminate paper request forms for libraries represented in the union catalog. **Library** staff can generate paper request forms by calling up the ILL template and completing the appropriate information. The comments field can be used to indicate fax.

Patron-Initiated Requesting

The ILL module supports patron-initiated requesting if the customer chooses to permit patrons to search the union catalog **and** initiate their own ILL requests.

The Mandarin M3 system was developed to configure the online catalog **to** grant permission to patrons to place circulation holds on items held by another library within an M3 union catalog **configuration**.

Pricing

Sirs provides turnkey LAN/WAN hardware solutions. A customized proposal would be created based on the library requirements. Pricing for the M3 system is...

...Server configurations can be centralized or dispersed depending on customer preference and communications infrastructure.

The interlibrary loan module can be used within a union catalog **configuration** or in an individual library that does not use a union catalog.

The M3 ILL module can be accessed using standard Web browsers such as Netscape and Explorer.

The ILL module resides on a proprietary, native MARC database...

...LAN, WAN, or over the Internet.

The ILL module saves processing time by enabling librarians or patrons to search a union or virtual union catalog, **identify** items and their availability, invoke a template in which routing information can be entered, and electronically transmit the request to the potential lender.

No third...

...800-848-5878

E-mail: makc@oclc.org

Web: www.oclc.org

The OCLC ILL Service is one component of the OCLC central union catalog **and** bibliographic utility. OCLC ...which is maintained by OCLC. OCLC also maintains the database of active and archived requests. OCLC member libraries have access to WorldCat, the online catalog of records and holdings. Although most OCLC ILL requests are based on WorldCat records, OCLC ILL also provides a blank work form to allow staff to...

...requests could not be filled, or for overdue items.

Copyright Compliance

OCLC ILL does not yet support copyright tracking with the U.S. copyright law **or** the CONTU Guidelines. OCLC currently supports a specific field only for U.S. copyright, other copyright statements may be

included in borrowing or lending notes...based on any field and print requests in that order. Libraries can not customize what is printed.

Lending staff check their online and print catalogs **and** write the call number and location on the copy of the request. Requests for items

in branch and departmental libraries are retrieved using local procedures

...allowed to enter an unverified request onto an online form that is later

verified by staff. A second option permits patrons to search virtual catalogs **and** place requests that are mediated by staff or that may pass unmediated to profiled lending partners if the item is available. Finally, patrons may also...libraries to share materials easily by means of

ISO ILL Protocol messaging. Libraries that share an automation system **or**

are part of a union catalog **can** borrow and lend to partners within and outside of their integrated library system simply by setting up profiles for each separate library.

RSS interoperates with...

...fields from a Z-server. Designated staff can also refine the results of a Discover mapping to fine-tune search results. Patrons can select catalogs **to** search from a library-defined list of Z39.50 search targets, and staff can use the same or different lists. Search results are configurable, by...

...record and availability information. Serial and multivolume holdings are displayed at the detailed level, not the summary level. Search results are listed by each catalog **and** are not currently de-duped. Deduping is a planned enhancement for early 2001.

RSS supports the ISO ILL Protocol and was one of the first...

...and is accessed by workstations. Customers can license it separately or it may be included in the contract.

RSS can use a physical union catalog **but** it is typically set up to search and bring back title and holdings information from virtual catalogs **using** Z39.50 broadcast searching.

RSS uses local networks for communication between the server and the workstations.

RSS uses Microsoft SQL as the database.

RSS allows...train-the-trainers session. The trainers then work with

ILL staff in individual branches and libraries to ensure that they are comfortable with the duties **they** perform.

BORROWING FUNCTIONALITY

RSS allows patron-initiated mediated or unmediated borrowing of known items from virtual catalogs **and** mediated borrowing of unverified items from blank forms. Once a known item is selected, the patron confirms his or her identity, selects pickup locations and...

...or printed overdue notices and lists of overdue materials for telephoning if preferred.

Copyright Compliance

RSS tracks copyright compliance with the U.S. copyright law **and** with the CONTU Guidelines but does not currently track copyright compliance outside the United States.

Fines and Fees

RSS does not currently handle fines or...

...initiated requests to be sent automatically to preferred partners who

have the item available for interlibrary loan at the time the patron searched their catalog.

RSS does not currently limit the number of requests submitted by one patron nor does it have an absolute limit on the number of requests

any...return labels are optional.

The Request Process: Creating Patron Requests

RSS allows patrons to place loan requests and photocopy requests for items from virtual catalogs **by** clicking the Request button. Default forms are provided for those two request types, and customers can define as many additional forms as they wish and...

...process of requesting a journal article is similar to requesting a book

loan. Patrons search a journal by title or ISSN in a virtual catalog. **They** place requests for a specific issue of the journal using the same request process as used for book loans. Journals that are not found in the virtual catalog **may** be requested via a blank form to be verified by staff.

RSS does not currently support requests from commercial document suppliers. This is a planned...

...do not select or recommend lenders in RSS. Potential lenders are identified based on item availability and partnering relationships when staff search the virtual catalog. **Staff** may add more lenders if desired by conducting additional searches. RSS uses a simple load-leveling algorithm to distribute requests among potential lenders. For sites...by selecting Process New from Task Navigator and display the list of items that are requested from the library. Lending staff search their local catalog **from** the item request, review the available items and either overlay the bibliographic information or fill in blank fields with local holdings information for the selected...202-338-8914

E-mail: tlc@onpointinc.com

Web: www.onpointinc.com

Total Library Computerization (TLC) is an integrated program designed for small corporate, law, **and** special libraries including trade associations, schools, hospitals, church, government agencies, and other nonprofits with a collection size of up to 50,000 to 75,000...

...Prospero.

Patron-Initiated Requesting

TLC does not offer a separate patron-initiated system. If patrons do not find the needed item in their local catalog, **then** they would e-mail or phone library staff and initiate an ILL request using the process defined by the library.

TLC is not designed to...

...Technical staff are not required to operate TLC.

The system is password-protected.

Target Audience

TLC is aimed at small, usually private, special, corporate, law, **and** medical libraries. The collection size of customers is usually up to 50,000 to 75,000 items.

Current customers include Microsoft, VISA USA, USX Corp...directions.

Because there is no need for a systems administrator, no manual is provided for an administrator.

BORROWING FUNCTIONALITY

Patrons can search the local catalog **and** using a Request This Item button on the screen, request an intralibrary loan of an item from their local library. The catalog **displays** summary and detailed

holdings for serials and multivolume holdings. If a patron wants several items, then separate requests are generated. The form does not provide...

...is sent out, staff enter CCG or CCL into the request. TLC is not designed to track copyright compliance with the U.S. copyright law or the CONTU Guidelines. Customers can produce reports for any time period by journal title and copyright compliance code (CCG or CCL) recorded on the request...

...the printing of a request form similar to the ALA ILL Request form.

The Request Process: Creating Patron Requests

Patrons search the library's catalog via a Web interface. Both Netscape and Internet Explorer are supported. The catalog record indicates if the item is available. Patrons must be registered to check out materials from their own library, but they are not able to search...
...a modifiable e-mail message into which the patron keys in the needed information. The second, and more common practice for many of their law firm and other special library customers, is for the patron to phone the librarian and give the information to the librarian over the phone.

Customers using...Accessing Records

Patrons are offered three ways to initiate requests. The first is an online form, the second permits patrons to search virtual union catalogs and place mediated or unmediated requests, and the third option is for the patron to fill out a paper form. Library staff verify and enter requests...

...Pricing varies according to the numbers of libraries in the consortium and the features they wish to implement. Base price includes a virtual union catalog, patron authentication, and a search-and-request management functionality. Installation of URSA software on the server, configuration and setup, training, and documentation are also included in

...custom manipulation.

Support of Standards

URSA supports Z39.50, Version 3. Search targets within the consortium are set up and maintained by epixtech staff. Catalogs of nonmember libraries may also be set up for searching if desired. Search results are de-duped and displayed in alphabetical order, the format of which...

...sort search results on demand by author, title, and publication date. URSA displays serial and multivolume holdings at the level displayed by a local catalog.

URSA uses epixtech's RSS implementation of the ISO ILL Protocol and the IPIG Profile for external requesting. epixtech is committed to be one of the...

...Web-based ADA device with their workstations.

System Architecture

URSA is designed to run on a single centralized SUN server with connections to library catalogs **and** patron databases. In some large installations, distributed servers are added to balance searching loads.

Library staff and patrons access the URSA system via remote Web...

...maintenance activities.

Target Audience

The target audience is a consortium whose members use many integrated library systems and who wish to provide a virtual catalog, **mediated** and unmediated resource sharing, and extended circulation capabilities. Consortium members include all sizes and types of libraries, from tiny single-building public libraries to large...

...are used when new libraries join the existing consortium.

BORROWING FUNCTIONALITY

URSA allows patron-initiated mediated or unmediated borrowing of known items from virtual catalogs **from** members of the consortium. It also ...the library prefers, including printed notices, phone, or telecirc messages.

Copyright Compliance

URSA does not currently track copyright compliance with the U.S. copyright law **or** the CONTU Guidelines. That enhancement is planned for early 2001. URSA does not support copyright compliance that may be required by other countries.

Fines and...

...Printing

URSA does not print return labels or routing slips.

The Request Process: Creating Patron Requests

Patrons, using a Web browser, search the virtual catalog **and** review the results of that search in either a brief or long display. They select an item from either display by simply clicking the Request...

...result screen and initiates another request. Patrons can type information into a blank form if they do not find the item in the virtual catalog.

Customers may limit the number of active requests each patron may have. Staff can override the limit if necessary. If the limit is reached, the patron...

...place a request for a specific issue of the journal using the same process as used for monographs. Journals not found in the virtual catalog **can** be ordered using a blank form; unverified requests are mediated by library staff. Patrons cannot send requests directly to commercial document suppliers, but that capability...

...send the request to the first potential lender. Potential lenders are selected based on item availability when an item is selected from the

virtual catalog. **Staff** may override the lender or add more lenders if the patron has searched only a subset of the available locations. Patrons do not select or...local accounting systems but can put out files

as necessary for use by local systems.

Patron-Initiated Requesting

VDX permits patrons to search remote catalogs **and** initiate ILL requests. Depending on local business rules, these requests are send directly and automatically to the first lender or are reviewed by staff.

The...

...the software but did not provide and pricing information. The base price

includes a perpetual license for the VDX software, including the virtual

union catalog, **and** the Oracle database. Optional components include

Z'mbol, a meta-data indexing/searching tool, and Z2Web, a Z39.50

server/client that can integrate non There is an underlying CORBA

architecture for load balancing. Web2, the virtual union catalog,

may reside on the same box with the Oracle database, or on a

different server, being either Unix or NT. VDX can use the main http...

...may choose to use one central server for multiple sites or operate in a

distributed server mode.

VDX does not require a physical union catalog **but** includes a virtual union catalog. **The** VUC can search both Z39.50 resources and

non-Z39.50 resources through one interface.

VDX offers both a Windows and a Web interface for...

...features that streamline request processing. Patron-initiated requests

can be transferred direct into the transaction database. Requests can be

searched against local and remote catalogs **for** holdings discovery.

Lender strings can be created based on local business rules included in profiles. Depending on the patron category, requests can be sent directly

VDX tracks copyright compliance with the U.S. copyright law **and** the CONTU Guidelines. VDX also supports copyright compliance for the United Kingdom, New Zealand, and Australia.

Fines and Fees

VDX does not handle fines and...

...print spooler is used.

The Request Process: Creating Patron Requests

Patrons have three ways to create requests, two of which involve searching a remote catalog. **A** patron searches a remote catalog **using** Z390.50 or a non-Z39.50 search. On the brief or detailed display, the patron clicks a Request button. A form is presented with...

lending requests and review them. VDX does not mark requests that have been

printed but not answered.

VDX DocFind process can search the local catalog **to** find call

numbers and location using a Z39.50 search. Staff print pick slips of new

lending requests. Pick slips may be printed in a...3397, ext. 7295
E-mail: jwilson@fsc.follett.com

Web: fsc.follett.com

Aimed at K-12 school libraries, WebCollection Plus is an online catalog **that** includes an interlibrary loan feature. This feature permits patrons to submit e-mail requests to a specific library staff member for processing. Patrons can ask...

...an item held locally or ask their library to place an interlibrary loan request. The ILL feature does not interact directly with the online catalog. The ILL feature supports borrowing but not lending. Both loan requests and photocopy requests can be sent.

Archiving Records

The ILL feature transmits the patron request...

...Support of Standards

Web Collection is not designed to support the ISO IL Protocol, IPIG Profile, or the NISO Circulation Interchange Protocol (NCIP).

The Catalog **Plus** and Circulation Plus products print barcodes in both codabar and Code 39 formats.

The ILL feature is not ADA-compliant.

System Architecture

A physical union catalog **is** not required to use Web Collection Plus. Patrons may search a union catalog **or** Internet-accessible catalogs **to** discover material. An e-mail request form includes the patron's name, phone, and a large section for comments. Bibliographic information, including author, title, call...to support printing, but library staff will likely print requests submitted by patrons.

The Request Process: Creating Patron Requests

The patron searches the WebCollection catalog **and** finds an item. Netscape 3.x and higher and Internet Explorer 3.x and higher are supported. A patron clicks a button to call up...

20001101

12/6,K/60 (Item 2 from file: 47)

DIALOG(R)File 47: Gale Group Magazine DB(TM)

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05802986 **Supplier Number:** 62087872 (USE FORMAT 7 OR 9 FOR FULL TEXT)
THE STATUS OF LIBRARY AUTOMATION AT 2000.(Statistical Data Included)

Jan , 2000

Word Count: 41545 **Line Count:** 03698

...for academic libraries in Ohio

1968--Library of Congress begins distribution of machine-readable cataloging records

1970--Ohio College Library Center implements offline system for catalog card production

1971--Ohio College Library Center introduces online cataloging system
1971--University of Toronto Library Automation System (UTLAS) formed
to extend automation initiatives begin...

...established
1981--Auto-Graphics Interactive Library Exchange (AGILE II) system introduced
1982--Brodart introduces Interactive Access System
1983--Library of Congress replaces printed National Union Catalog with microfiche edition
1983--UTLAS incorporated as private company owned by University of Toronto
1983--OCLC establishes Enhance program as quality control initiative for contributed...

...1967 as a not-for-profit regional processing center for academic libraries in Ohio. Using LC-distributed MARC records, OCLC implemented an offline system for catalog card production in 1970. An online cataloging system, the basis for OCLC's current cataloging services, was introduced in 1971. It established the operating model...

...specific books, serials, or other works. Participants modify the retrieved records to suit their requirements, add call numbers and other local information, and order printed catalog cards, magnetic tapes with machine-readable cataloging data, or other output products. Failing to retrieve a suitable record, participating libraries perform original cataloging online, thereby...than for cataloging. Offered by subscription with periodic database and index updates, MARC-derivative microfiche publications were marketed as versatile replacements for the National Union Catalog and other printed sources of cataloging copy. (The Library of Congress itself began replacing its printed catalogs with microfiche versions in 1983.) Compared to printed catalogs, microfiche publications offer more frequent updating and more useful indexing; compared to bibliographic utilities, however, their functionality is limited. They are computer-generated reference works...

...book, serial, or other publication. Once located and displayed on a microfiche reader, a cataloging record must be key-entered into a library's online catalog, word processing program, database management program, or other computer program. Microfiche publications provide no computer hardware or software components to support cataloging operations.

This limitation...

...disk drive. The appropriate cataloging record was displayed for editing to suit local requirements. The modified version was then added to a database from which **catalog** cards were printed. Subscribers received new diskettes and updated indexes at predetermined intervals. A later version, implemented by Library Systems and Services Incorporated (LSSI), replaced...

...printing specific cataloging records. As with bibliographic utilities, retrieved cataloging records can be modified to meet local requirements, then transferred to a library's online **catalog** or printed. Software also supports original cataloging for works not included in the CD-ROM database.

VENDORS AND THEIR PRODUCTS

As described above, cataloging copy...college and university libraries, 650 community college libraries, 1,000 public libraries, 500 medical libraries, 600 government libraries, and 175 consortia and processing centers that **catalog** books for multiple libraries. While RLIN serves fewer libraries, its customer list includes many distinguished research institutions. OCLC and RLIN enjoy excellent visibility and high... the contributed cataloging portion of WorldCat is attributable to retrospective conversion projects undertaken by OCLC participants since the 1970s to support the implementation of online **catalogs** and other local library automation systems. As their principal contribution to WorldCat, such retrospective conversion projects have added cataloging records for older imprints that predate...the market for bibliographic utilities and CD-ROM products by making them more useful to libraries outside of the United States, many of which must **catalog** U.S. imprints. For OCLC and RLIN, the dominant providers of computer-based cataloging services to medium-size and larger libraries, international markets offer the...to support cataloging and retrieval of bibliographic records in Chinese, Japanese, and Korean vernacular scripts. The RLIN database contains more than 1.5 million CJK **catalog** records contributed by RLIN participants and the Library of Congress, which uses RLIN for that purpose. The RLIN database also contains the largest collection of...web features. In 1999, OCLC introduced CAT Express, a web-based implementation of its online cataloging service, but it is intended for small libraries that **catalog** fewer than 2,000 titles per year.

As an alternative to its Windows-based cataloging software, OCLC offers a Z39.50 interface option that provides...

...words and phrases. With RLIN, local indexes permit retrieval of a participating library's own cataloging records by call number or other identifiers, such as **purchase order** numbers or donor names. Multiple search parameters can be combined with Boolean operators. Open DRA Net supports author, title, and subject searching. Impact/ONLINE CAT...for

the OCLC WorldCat database, which limits cataloging copy for a given work to a single bibliographic record contributed by the first participating library to **catalog** the work. Contributed cataloging records remain in the WorldCat database until they are superseded by LC copy. Other bibliographic utilities make multiple versions of contributed...products can generate various machine-readable and printed products from original or derived cataloging records. All bibliographic utilities and CD-ROM cataloging products can print **catalog** card sets, although demand for printed cards has declined considerably in recent years as online **catalogs** have increasingly replaced card **catalogs**. Depending on the vendor, card sets may be printed offline by bibliographic utilities for shipment to customers or locally by printers attached to cataloging workstations. OCLC, which has offered offline card printing capabilities since 1970, can produce **catalog** cards in a wide variety of formats, but orders are declining by 20 percent per year from 19.1 million cards in 1997 to 15...

...declining demand among the research libraries that dominate its customer base. The other bibliographic utilities and all CD-ROM cataloging products support local production of **catalog** cards. Other products, such as book pockets and spine labels, may be printed as well.

Bibliographic utilities and CD-ROM cataloging products can generate machine...

...the WorldCat database. Participating libraries can also order an electronic file of printable item labels.

RLIN and Impact/MARCit support the delivery of machine-readable **catalog** records on magnetic tape or through electronic transfer. RLIN snapshot tapes contain a library's newly added or updated cataloging records for a specified time...During the 1970s and 1980s, government grants and other external funding were widely directed toward such projects as a prelude to the implementation of online **catalogs**.

But, despite decades of effort, much work remains to be done. School libraries are a large, untapped market for library automation services of all types...

...Africa, and Pacific Rim nations.
Z39.50 CATALOGING ALTERNATIVES

Since the 1980s, as noted above, libraries of all types and sizes have replaced their card **catalogs** with online **catalogs** supported by locally installed integrated systems. In recent years, thousands of academic and public libraries have made their online **catalogs** available, without significant access restrictions, through the Internet. These online **catalogs** contain MARC records, many of

which were obtained from bibliographic utilities or CD-ROM cataloging products. As discussed elsewhere in this issue, some integrated library systems can be configured with Z39.50 server software, and such capabilities are widely installed in medium-size and larger libraries.

The online **catalog** of the Library of Congress, for example, operates on a Z39.50 server. It offers convenient access to the millions of cataloging records contained in the LC MARC database.

In theory, any integrated library system that supports Z39.50 client software can retrieve and download MARC records from online **catalogs** that operate on Z39.50 servers. Once downloaded, the records can be transferred to an integrated system for editing by the system's cataloging module and inclusion in the library's online **catalog**. As discussed above, OCLC supports a Z39.50 interface that provides access to the WorldCat database from appropriately equipped local automation systems, but that interface...for resource sharing, which Z39.50 cataloging software does not address.

PART 2. INTEGRATED LIBRARY SYSTEMS
SOME IMPORTANT DEVELOPMENTS SINCE 1975
1975--Custom-developed online **catalog** and circulation control system implemented by Virginia Tech as forerunner of VTLS
1977--Geac Library Information System (GLIS) introduced
1978--Data Research Associates (DRA) implements...

...BiblioTix system
1992--International Library Systems introduces SydneyPLUS system
1992--MARCorp introduces Voyager system
1993--DRA acquires INLEX and Praxa
1993--CARL introduces Kid's **Catalog**
1993--OCLC acquires Information Dimensions
1994--DRA acquires multilIS system
1994--Ameritech Library Services formed through merger of Dynix
and
NOTIS
1994--Nichols Advanced Technologies...

...library operations. The particular applications supported by integrated library systems are subject to product-specific variations. A minimal configuration includes programs for cataloging, online public **catalog** access, and circulation control. The cataloging component, which is required, supports data entry, importing bibliographic records from external sources, database management capabilities, and, in some cases, authority control. The online public access **catalog** component supports a varied range of retrieval capabilities. It is often the principal motive for an integrated system implementation. Circulation control, while not essential, may be inextricably linked to cataloging and the online public access **catalog**.

Acquisitions and serials control are popular but usually optional additions to the basic integrated system configuration. Reserve room capabilities, which are principally useful for academic...

...academic and public libraries, often as replacements for custom-developed computer programs implemented in the 1960s. During the 1970s, several vendors added online public access **catalogs** to their circulation control systems, but those implementations were primitive by today's standards and customers were slow to accept them. As late as 1985, for example, only about one-third of CLSI sites had installed that vendor's public access **catalog** module.

With an installation at Cleveland Public Library in 1978, Data Research Associates (...DRA) became the first library automation vendor to offer an integrated system that was designed from its inception to support cataloging, an online public access **catalog**, and circulation control. (Later versions added acquisitions, serials control, and other application modules.) Several academic libraries initiated development projects for integrated systems during the late...

...following a decade of planning for library automation in Israel.

During the 1980s, widely publicized concerns about the functional limitations and high costs of card **catalogs** stimulated an interest in online public **catalog** access, a core component of integrated systems. At the same time, prices for computer storage and video display terminals were falling to affordable levels, and...

...participation in bibliographic utilities, many libraries had accumulated sizeable collections of machine-readable cataloging records. As the simplest, most effective method of implementing an online **catalog**, integrated systems became the focal point for library automation initiatives. As an additional procurement motive, some academic and public libraries sought higher performance replacements for...
...Utah. Innovative Interfaces, which introduced a highly regarded acquisitions and serials control system in the early 1980s, subsequently broadened its product line to support online **catalog** access, circulation control, and other library operations. The Inlex/3000 system, based on a product developed by Electric Memory Incorporated, was introduced in 1984. In...

...developed by CTB/ Columbia Computing Services and recently acquired by CASPR; MOLLI from Nichols Advanced Technologies; Winnebago CIRC/CAT from Winnebago Software Company; and Circulation/**Catalog** Plus from Follett Software Company. Some of these products remain available, although in significantly improved versions. Also during the 1980s, several vendors--including Data Trek Plus/**Catalog** Plus)

- * Kelowna Software (Library 4 Universal)
- * Lex Systems (LexiFile and LexiWin)
- * New Generation Technologies (LibrarySoft)

- * Precision Computer Service (Surpass)
- * Sagebrush Technologies (Athena)
- * SIRS (Mandarin MS...)

...in their installation patterns, mainframe and minicomputer-based products are conceptually similar. Both employ timesharing operating systems that support multiple online terminals for cataloging, public **catalog** access, circulation control, and other applications. Like their business software counterparts, mainframe-based integrated systems were popular through the 1980s and, while they are no...servers perform database management, information retrieval, and transaction processing tasks, while clients handle the user interface and input/output operations.

In an online public access **catalog** application, for example, a library's bibliographic database resides on a server, while each client device provides a graphical user interface, with menus, icons, dialog boxes, and other components that simplify the entry of **catalog** search instructions. When a retrieval request is formulated, the client device transmits it, in an appropriate format, to the server. The server retrieves bibliographic records...IBM RS/6000 and HP 9000, dominate.

Whether Unix or Windows NT servers are used, clients are desktop computers that perform cataloging, circulation transactions, online **catalog** searches, book ordering, serials check-in, or other tasks supported by an integrated system's software. Client devices are usually Windows-based personal computers. Some...

...implementation permits different types of clients in the same installation-Windows-based computers for cataloging, acquisitions, and other technical services operations; HTML-compatible clients for **catalog** searching or access to other databases; and a thin client at the circulation desk.

Integrated Systems for Personal Computers

Small libraries in schools, community colleges...

...II, which was widely installed in schools. Functionality improved steadily during the late 1980s and early 1990s as vendors added and repeatedly enhanced the online **catalog**, acquisitions, and other application components. The steadily expanding processing power and storage

capacity of desktop computers facilitated these developments.

Today, most PC-based integrated systems...vendors provide a list of source tapes that have been successfully loaded into their systems. PC-based systems, which characteristically lack tape drives, can import **catalog** records on diskettes in the MicroLIF variant of the USMARC format. Many integrated systems also support an online interface for direct transfer of cataloging records...headings are the most commonly controlled fields. Depending on the system, authority records may be key-entered, generated from existing headings in a library's **catalog**, or imported in machine-readable form from external sources, such as the Library of Congress Name Authority File or the Library of Congress Subject Authority

...

...Some integrated library systems permit multiple authority files. Several integrated systems, intended principally for corporate and government libraries, support thesaurus-like cross-reference structures that include broader **terms**, narrower **terms**, related terms, and scope notes, in addition to the familiar "see" and "see also" entries.

Online **Catalogs**

Online **catalogs** are a defining characteristic of integrated library systems. As noted above, the introduction of effective OPAC modules in the late 1970s and early 1980s signaled the transition from single-purpose library automation products to true integrated systems. For most libraries, the implementation of an online **catalog** as a substitute for a card or book-form **catalog** is the principal motive for installing an integrated system. Along with circulation control, the OPAC is the integrated system module that has the most impact...

...are accustomed to graphical user interfaces and may consider text-based menu programs dated and inferior. As a potentially significant constraint, however, Windows-based online **catalog** modules require personal computers or, where supported, thin clients as OPAC workstations; by contrast, menu-driven programs with text-based interfaces can employ inexpensive online...

...mode that retains a graphical user interface while supporting advanced retrieval functionality.

Several OPAC interfaces have been developed for specific library users. The Kid's **Catalog**, developed by CARL Corporation and adopted by a number of integrated systems, is one example. As a recent innovation that has been rapidly and widely adopted, most integrated system vendors offer a web server component that permits access to a library's online **catalog** using a web browser, either through an Internet connection or from locally installed OPAC terminals. Examples include GeoWeb from Geac, CARLweb from CARL Corporation, Dynix...

...interfaces designed specifically for young library users. Like the Windows-based OPAC modules described above, a web browser provides a familiar graphical interface that simplifies **catalog** searches. In its latest implementation, the Techlib system from Open Text supports web browser interfaces for cataloging, circulation, acquisitions, and serials control as well as...

...OPAC module.

Interface characteristics aside, all OPAC modules can retrieve bibliographic records by author, title, and subject, the three traditional

search parameters supported by card **catalogs**. Typically, a user specifies a field to be searched and a name, subject heading, or other value to be matched. Other retrieval capabilities vary from...

...one in which the searcher is located. Some integrated systems allow a library to define a portion of its holdings, such as a special collections **catalog**, that can be searched separately.

If only one bibliographic record satisfies a retrieval specification, it is usually displayed immediately for operator perusal. Where other search...library systems can display full MARC records with tags and subfield codes, but that format is more appropriate for technical processing operations than for public **catalog** access.

When no bibliographic records are retrieved by a given search, most OPAC modules display a scrollable, alphabetized list of field values that most closely...

...to retrieve bibliographic records, the assumption being that a typographical error or misspelling led to the retrieval failure.

Several integrated systems offer an optional union **catalog** component that consolidates the **catalogs** of multiple libraries. As an example, INN-Reach software from Innovative Interfaces provides a central repository for bibliographic records created at multiple linked INNOPAC sites. It is installed at OhioLINK, where 70 libraries have access

to a union **catalog** of 70 million bibliographic records.

Circulation Control

The circulation control modules of integrated library systems automate a variety of tasks, including check-out, check-in...

...searches. Holds may also be placed on items that are on order or awaiting cataloging.

Acquisitions and Serials Control

As defined above, cataloging, online public **catalog** access, and circulation control are core components of most integrated library systems. They are usually included in a basic system configuration, although special components, such as web-based **catalog** access or self-service circulation terminals, are separately priced. Other application modules may automate important library operations, such as acquisitions and serials control, but they...system components, records for ordered items are included in a library's bibliographic database, and on-order status is reflected in the online public access **catalog**.

Purchase orders may be printed in several formats. A growing number of acquisitions modules support electronic transmission of orders to book jobbers or other vendors. While some...

...the original BISAC format, which was developed in the 1980s by the Book Industry Systems Advisory Committee, most programs have adopted BISAC X12 standards for **purchase orders** and related procurement data.

Several integrated systems vendors have recently announced support for international EDIFACT standards, which will eventually supplant the BISAC standards for electronic...

...information is included in the library's OPAC, which is updated to reflect the receipt of new issues. Typical management and statistical reports include serials **catalogs** and union lists, on-order lists, lists of issues received, lists of issues past due, lists of claiming notices sent, and vendor performance reports. Some...

...well as equipment and facilities, such as videocassette recorders and meeting rooms, that are subject to advance reservations. Typical management reports and notices include media **catalogs**, reservation work slips and schedules, media activity reports, overdue notices, and usage summaries.

Other optional application modules appeal to specific types of libraries. Reserve room...

...circulation management capabilities for items placed on reserve by specific instructors for designated courses. Reserve room materials are so designated in the library's online **catalog**. Most reserve room modules can also accommodate photocopies and instructors' personal copies for which brief cataloging records are created. Depending on the system, loan periods...selection. Some vendors of integrated systems also provide interfaces to CD-ROM information products, online information services, and web sites. OPAC workstations commonly do double-duty as Internet terminals. Welcome screens list web access as an option, along with the library's **catalog** and locally mounted reference databases. If a bibliographic record contains a web address in the MARC 856 field, it can be linked to that site...International, Inmagic, Open Text, and Robert A. Schless and Company target corporate and government libraries. Innovative Interfaces is the leading supplier of integrated systems to law school libraries. Some vendors have changed their market focus over time. SIRSI, for example, initially offered its Unicorn system to small public, college, and special...

...its larger counterpart, offers continued opportunities for new installations, but several factors constrain revenue growth. While many school and town libraries still rely on card **catalogs** and manual circulation procedures, those libraries have significant budget constraints, which limit their installations to low priced products. Further, PC-based integrated systems, being inexpensive...decades of integrated system development, available products share many operating characteristics and features. This is especially true of the core

application modules--cataloging, online public **catalog** access, and circulation control--that are implemented at all or most customer sites.

Features that were distinctive in the 1980s, when many libraries operated primitive...

...incorporate additional information resources for reference and research by library users and staff. Examples include community information, commercially available databases, web sites, and the online **catalogs** of other libraries. These additional information resources may be installed on an integrated system or reside on external computers to which the integrated system is...

...answer file for suggestions, inquiries, comments, or other communications from library users.

Since the mid-1980s, integrated system vendors have offered gateway access to online **catalogs** in other libraries that operate identical systems. Some integrated system vendors have promoted such interconnectivity as a competitive advantage. As an example, the ALEPH system...

...was designed from its inception to support multilibrary implementations of networked computers. In Israel, bibliographic databases maintained at interconnected ALEPH sites comprise a national union **catalog** that is fully searchable from each participating library. CARL Corporation has likewise emphasized intersystem connections that permit online **catalog** searches and other interaction among CARL installations.

Today, the NISO Z39.50 standard, combined with Internet connectivity, facilitates OPAC searches and other interaction between the...

...employs client/server technology. When equipped with Z39.50 client software, the OPAC terminal of one integrated system can search Z39.50 servers, including library **catalogs** and other databases, using the retrieval commands and operating procedures associated with the terminal's host system. An unusual feature in the mid-1990s, the...integrated system vendor supplies programs to load the database on the library's computer and make it accessible through the library's online public access **catalog**, using OPAC commands and retrieval procedures. With the most flexible integrated systems, the library specifies the data fields to be indexed, the fields and labels...

...can be configured with the CD-ROM edition of Encyclopaedia Britannica.

Several PC-based integrated systems, including Brodart's PinnacleOne and Follett's Circulation Plus/**Catalog** Plus, support interfaces to

CD-ROM cataloging support products, as does Gaylord's minicomputer-based GALAXY system. SIRSI's CD-ROM Gateway component connects a...

...database searches.

As described above, integrated systems of all types and sizes support web server components that permit Internet access to a library's online **catalog**. While that capability is relatively new, it has been implemented by thousands of libraries; few library automation products have been as quickly and widely accepted...

...by its PC-based library automation products. A library sends its bibliographic database to Follett for processing. Based on subject headings contained in a given **catalog** record, the 856Express service inserts one or more URL addresses for pertinent web sites into the 856 field. When a bibliographic record is retrieved, an...

...workgroups. Livelink users can access Techlib's OPAC component or locally mounted reference databases to retrieve bibliographic citations pertinent to specific projects or business activities. **Catalog** records can be incorporated into folders and combined with word processing documents, spreadsheets, e-mail, URL addresses, and other information resources to be shared among...modules that link computer-processible representations of books, journal articles, technical reports, photographs, manuscripts, or other documents to bibliographic records in a library's online **catalog**. Examples include ENCompass module from Endeavor Information Systems, the VTLS ImageManager, Techlib Digital Collections from Open Text, and SIRSI's Hyperion Digital Archive System. Depending...

...computers, interactive terminals, specially designed software, and machine-readable databases to retrieve information requested by library users. While that definition encompasses the online public access **catalogs** discussed elsewhere in this issue, online searching customarily refers to computer-based retrieval of information contained in indexing and abstracting journals, bibliographies, encyclopedias, directories, and...multidisciplinary category, although they may not provide equivalent coverage of all subject areas. Other online services--such as Profound and LEXIS, which cover business and law, respectively--are clearly specialized, although they may offer a few databases outside their main subject areas. Among CD-ROM database publishers, SilverPlatter Information is obviously a multidisciplinary supplier. Its CD-ROM **catalog**, which contains hundreds of titles, spans all major subject disciplines. By contrast, other CD-ROM publishers, like Aries Systems and West Group, concentrate on a single subject area, such as medicine or law.

In recent years, some specialized online services have broadened their topical coverage. As an example, STN International, the world's

largest and most important source...

...extent, public and school libraries--that must satisfy information requirements in a variety of subject areas. They are also used by corporate, government, medical, and **law** libraries to supplement the narrow topical coverage provided by specialized online services. Multidisciplinary search services differ in their database offerings, their operating characteristics, their suitability...popular periodicals.

Broad topical coverage includes banking, communications, computers, consumer products, energy, entertainment, the environment, marketing, insurance, politics, public affairs, and transportation.

The NEXIS database **catalog** lists thousands information resources, a much larger number than other online services. Comparisons based on the number of database listings are potentially misleading, however. News...certain online search services are specifically and exclusively designed to support research activities in particular subject areas or professional disciplines, such as medicine, science, engineering, **law**, and public affairs. The earliest examples, the SUNY/Biomedical Communications Network and the National Library of Medicine's MEDLINE service, predated multidisciplinary search services, although...

...Canadian Centre for Occupational Safety and Health.

Search services for computer-assisted legal research have been available for two decades. They are widely used by **law** firms, corporate legal departments, government agencies, **law** school students, public affairs organizations, and others who need timely access

to **laws**, judicial opinions, legal publications, and other documents. The most important examples are LEXIS, the legal component of the LEXIS-NEXIS service operated by Reed Elsevier, and Westlaw, which is operated by West Group. Their offerings include the full texts of federal and state codes, court cases, constitutions, rules, and **regulations**; administrative decisions from selected government agencies; legal publications; and other materials of interest to legal researchers.

Public affairs search services are specifically designed for online legislative tracking and research by **law** firms, political scientists, issues management specialists, corporate public affairs offices, and government agencies. Examples include the Washington Alert Service, operated by Congressional Quarterly and Legi...

...multidisciplinary search service, typically Dialog or BRS, supplemented by one or two specialized services and locally installed CD-ROM reference products. Corporate, government, medical, and **law** libraries relied on one or two specialized services and selected CD-ROM reference products appropriate to their subject disciplines ...Ridder increased its

involvement in online searching by acquiring DataStar, the leading European multidisciplinary service, from Radio Suisse. Knight-Ridder Information published the first joint **catalog** of Dialog and DataStar databases in 1995 and allowed searchers to switch between the two services during an online session. The two services were never...

...Wolters Kluwer U.S. Corporation, a subsidiary of a Dutch information and publishing company. Wolters Kluwer had previously acquired CCH Incorporated, a leading provider of **tax**, business **law**, and healthcare information.

Among specialized services, Mead Data Central sold LEXIS and NEXIS to Reed Elsevier, an Anglo-Dutch publishing company, in 1994. The acquired... NEXIS provides extensive coverage of worldwide news publications, while LEXIS and Westlaw have expanded their online collections of European, Asian, and Australasian legal statutes, government **regulations**, case **law**, and legal publications.

By simplifying telecommunications, the Internet has addressed the most significant impediment to globalization of online search services. In particular, Internet connections give...

...to North American libraries since the mid-1980s, but, prior to the development of Internet connections, access required complicated, expensive telecommunication arrangements. While its database **catalog** is impressive, ESA-IRS lacks the breadth and depth of subject coverage provided by Dialog and DataStar, but it does offer distinctive European information resources...

...of their databases. Blaise Line and Blaise Web offerings include bibliographic files, which contain cataloging and other information for books and serial publications; British Library **catalogs**, which cover various departmental collections; and a limited selection of subject databases. The Belgian Information Dissemination Service (BELINDIS) is operated in Brussels by the Belgian...

...countries. L'Europeenne de Donnes is a French search service that provides online access to databases in five broad subject areas: news and public affairs, **law**, business and economics, social sciences, and sports. Eurobases, a commercial search service based in Brussels, and ECHO, a non-commercial service operated in Luxembourg by...Internet Subscription Service, the KnowledgeCite Library, SIRS Knowledge Source, BiblioLine, the CSA Internet Database Service, Ei Village, ChemWeb, RDS Business Reference Suite, Powersize, CCH Internet **Tax** Research Network, and such previously mentioned biomedical information services as HealthGate, Medscape, Avicenna, Knowledge Web, and MD Consult.

OCLC's FirstSearch Web is an example...to news publications. Legal databases offered by LEXIS and Westlaw contain the complete texts of federal, state, and international codes, court cases, constitutions, rules, and **regulations**; administrative decisions from selected government agencies; and legal publications. The CQ.com On Congress service provides the full text of official printed versions of bills and **laws**, as well as online access to the Congressional Record and Federal Register, verbatim news transcripts of Congressional and Executive Branch briefings, committee reports, and CQ...hosting services, such as SwetsNet and Catchword. Alternatively, database records can be linked to local holdings information in a library's web-based public access **catalog**. SilverPlatter has also developed links to fee-based document delivery suppliers, including the British Library Document Supply Centre and the Canada Institute for Scientific and...

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05513717 **Supplier Number:** 57800482 (USE FORMAT 7 OR 9 FOR FULL TEXT)
INTEGRATED LIBRARY SYSTEM SOFTWARE FOR SMALLER LIBRARIES.

July , 1999

Word Count: 82294 **Line Count:** 06591
...and Libraries (expanded from March-April 1999 issue)
 Searching
 School Interoperability Framework (SIF)
 Authority Control
 Shared vs. Stand-Alone Systems
 Barcode Technology
 Publishing a Library **Catalog** on the Web
 Selecting an Operating System Platform
 Migration
 Reviewer's Observations
 These sections selectively expand on issues that are encountered
 in
 the reviews. They the more specialized products aimed at special
 libraries)
 for a software license sufficient to handle cataloging, circulation and
 public access **catalog** functions on a five-machine local area
 network.
 A small library, for our purposes, is one whose needs can be met
 by
 such a system...

...it is not fair to compare systems which offer wildly different sets of features. Thus, only products offering, at minimum, cataloging, circulation and public access **catalog** functions were considered in this set of reviews. Further, as a measure of sophistication and recognition of basic bibliographic standards, the systems had to be...

...AutoLibrarian
On Point TLC

This issue contains reviews of these products:

Book Systems Concourse
CASPR LibraryWorld 98
Chancery Library Pro
COMPanion Alexandria 5
Follett Circulation/**Catalog** Plus for Windows
Kelowna Library 4 Universal
New Generation LIBRARYSOFT
Precision Surpass
Sagebrush Technologies Athena
Winnebago Spectrum

The following vendors were in the throes of...questions through ahead of time and be able to answer succinctly and convincingly.

With respect to an OPAC, the generic responses might include: An automated **catalog** provides powerful new ways to search for information. It makes it possible to find and use parts of the collection that would otherwise be unknown and inaccessible. **Catalog** access can be extended (with most systems) to users connecting from home, work or school, thereby extending the library's reach into the community that supports it. Upon locating an item in the **catalog**, one knows immediately whether it has been checked out or is available on the shelf. The elimination of card typing and filing will free up...

...of creating a recorded description of bibliographic items in the collection, designating access points by which a user might search for each item in the **catalog**, and assigning a physical location to the item in conformance with some classification scheme. This process can be speeded up through copy cataloging-employing high...

...locate and download an existing record. Copy cataloging dramatically reduces the intellectual effort called for locally, and thereby reduces the amount of time necessary to **catalog** materials. All this economy notwithstanding, the editing facilities of the local system's cataloging module also allow local record augmentation and the creation of original...

...and serials control make it easier to monitor library materials

expenditures, handle receiving and claiming of materials, pass descriptive and holdings information along to the **catalog** and the circulation system, collect useful management statistics and generally manage the business of buying and processing materials for the collection. Savings in staff time...do in your library if ten hours of additional staff time suddenly became available every week? What are the five biggest headaches with the current **catalog**, circulation system, acquisitions routine?

DOING BACKGROUND RESEARCH

An automated library system is not a panacea. It can help your library provide better service to its...

...in one instance, involve internal support for import of USMARC authority records and their use to implement a system of cross-references within the public **catalog**, with global control of name and subject headings thrown into the bargain. In the next product it may simply connote the availability of a pick...

...Systems	Library	Library	Concourse	World '98	Pro
------------	---------	---------	-----------	-----------	-----

(x=included in base system,
a=available at extra cost)

Major Features

Cataloging	x	x	x
Public Access Catalog	x	x	x
Circulation	x	x	x
Acquisitions	a	a	a
Serials	a	a	a
ILL			

Data Handling

MARC import	x	x	x
Lossless MARC export		x...	
COMPanion	Follett	Kelowna	
			Alexandria Circ/Cat L4U

(x=included in base system,
a=available at extra cost)

Major Features

Cataloging	x	x	x
Public Access Catalog	x	x	x
Circulation	x	x	x
Acquisitions	x	x	x
Serials	x		
ILL			

Data Handling

MARC import	x	x	x
Lossless MARC export			see
text...			
...x	x	x	

New		
Generation		
Librarysoft	Precision	
	Surpass	

(x=included in base system,
a=available at extra cost)

Major Features

Cataloging	x	x
Public Access Catalog	x	x
Circulation	x	x
Acquisitions	x	
Serials		
ILL		

Data Handling

MARC import	x	x
Lossless MARC export		
Non-mirror MARC export	x	
Preview prior...		
...reports	x	x

Sagebrush	Winnebago
Athena	CIRC/CAT

(x=included in base system,
a=available at extra cost)

Major Features

Cataloging	x	x
Public Access Catalog	x	x
Circulation	x	x
Acquisitions		
Serials		
ILL		

Data Handling

MARC import	x	x
Lossless MARC export		
Non-mirror MARC export		
Preview prior to import...for original cataloging can not be used effectively in public services or some other area. A by-product of faster		
processing is a more current catalog and materials finding their way into the collection more quickly than would otherwise be the case.		
If the original work has been done by an organization that does high		

quality work, the quality of the local **catalog** will be enhanced at the same time. Consistency is the bugaboo of occasional catalogers and is precisely the strength of standards-oriented work done at...

...useful for grabbing records for free directly from Library of Congress.

MARC MAKES COOPERATION AND MIGRATION EASIER

Libraries wishing to contribute records to a shared **catalog** can do so easily if they are able to export USMARC records. Even if content has been homogenized, the format will at least allow entrance to the matching process by which records from multiple sources are merged onto a single master bibliographic record. In a union **catalog** of any size, chances of any incoming record being unique and becoming a new master record may be relatively small. Ideally, however, the matching algorithm...

...import capability is nil. If the library's bibliographic data are unlikely to be contributed at any time in the future to a larger combined **catalog**, or if migration to a MARC-oriented system in the future is inconceivable, the argument for export capability is weakened.

For some libraries, the question...

...For \$500 or so one may choose from several packages that do an acceptable job of such basic tasks as circulation and providing a searchable **catalog**. There are certainly features missing that one would expect in the \$3,000 to \$5,000 range more typical for products aimed at school and **catalog** projects that will ensue. In my view, import is essential for any library whose collection includes monographs.

SEARCHING

Once upon a time, heading searches were the only kind we could do in library **catalogs**. Author, title and subject headings were manually filed in alphabetical order. Occasionally, series or other added entries would be added by diligent catalogers. Avant garde institutions might venture to the cutting edge of accepted practice and create detailed analytic entries for constituent parts of a few important works. Debate on **catalog** searching focused on the advantages of the dictionary vs. the divided **catalog**, and the strengths and weaknesses of Library of Congress Subject Headings vs. Sears or some other thesaurus. How the world has changed!

Computers and databases...

...one can easily be distracted by feature-hype. Most libraries do not necessarily need all the search features one can conceive of for a public **catalog**. In many libraries, there is a point of diminishing returns beyond which the addition of search options tends to confuse patrons rather than empower them...

...to steer users to simple but less powerful approaches can also undercut inherent strengths of a product. This section reviews the broad range of public **catalog** searching capabilities to be found in current automated systems and attempts to point out situations in which well-implemented products may be of special value because of their search features.

Indexes

Most database systems, including library **catalogs**, use indexes to speed searches of their contents. The internal workings of indexes vary greatly with the type of database engine, the nature of the...and title from "Joe something or other, Running for Glory or Bound for Glory or Glory Bound--something like that--was the title." A computer **catalog** that supports only heading searches doesn't help much in such a circumstance. One can only try each permutation in turn, scroll through the matches...

...Rarer still is support for embedded multi-character wildcards that would allow such searches as "*link" to include "hyperlink", "weblink", "LANlink".

In order to make **catalog** searching as easy as possible, even the vendors that support these more advanced search options have buried them to avoid confusing people. If precise searching is important in your library, if you wish to use the **catalog** to teach electronic searching technique, it pays to research these nuances before purchase.

Other Features

Few of the packages reviewed in these two issues offer...

...support, whereby one may specify several keywords and the maximum number of words that may separate them before they are excluded from retrieval.

Most library **catalogs**, unlike databases of journal articles, are small enough so that the additional precision afforded by proximity capability is unneeded.

Some **catalogs** support a limit function, perhaps coming from a menu bar option, that adds one or more additional conditions that must be met in order for...a glorious name for the mundane mechanisms that maintain consistency in the use of terms in any database, and most especially in an online library **catalog**. While keyword searching is a powerful tool in any electronic environment, it cannot supplant the precise retrieval that is possible using a controlled vocabulary of subject **terms** and names. Moreover, keyword retrieval is itself enhanced when keyword indexes can be built from standardized subject and name headings.

Good cataloging practice dictates that subject terms that describe a

bibliographic entity should derive from a standard thesaurus of descriptors. New **terms** should only be created where necessary, and then only according to the rules set forth by rules consistent with the thesaurus. Name headings should be...

...and name headings from within the cataloging module, making it easy to utilize the exact form of heading that conforms to current practice in the **catalog**. Other systems allow one to create and maintain authority records within the **catalog** database. These records can be used not only to support consistent cataloging practice, but also to manage a system of See and See Also cross...may be simpler and easier to leave these tasks to a knowledgeable person or persons at some central location.

2. Providing web access to the **catalog** can add a considerable increment of complexity to operating the local system. The cost of the wide area network connectivity necessary to support web access...

...that might have come from not requiring an Internet connection.

3. A greater number of resources are visible and more readily accessible through a shared **catalog** of multiple library collections.

4. A greater number and variety of capabilities are generally available on a larger system.

5. A shared system may make...

...it is often copy cataloging--attaching local holding information to a title that someone else has already entered into the database.

8. The quality of **catalog** records may be higher than would otherwise be possible locally if some members of the shared system have access to OCLC or other source of high quality records.

9. Assistance from others using the same system may be more helpful because everyone sees the same thing.

10. The library **catalog** is available over the World Wide Web (and probably by telnet for those who require it) 24 hours a day, without the local library needing...items in the collection are already linked to their corresponding database records and the library is ready to circulate materials, fire up the public access **catalog** and generally rock and roll. Subsequent additions to the collection, if supplied by a book vendor that also provides MARC records, can be purchased with...

...it. The problem lies in too many loose ends. Somehow, somewhere, it takes time and effort to upgrade those brief records to something that supports **catalog** searches. At the same time, those items in the collection that circulate less frequently gather dust waiting to be attended to among a welter of...practice and get written assurance from the new vendor that past practice can be carried forward or adapted under the

new system.

PUBLISHING A LIBRARY **CATALOG** ON THE WEB

Not too many years ago, one of the defining differences between PC-based library software and larger integrated systems running on minicomputers...

...Internet.

Paradoxically, mounting a web-oriented database server with global reach is the best way to provide local library users with access to the library **catalog** from home, school and work. As long as the user has an Internet account, the problem of the telecommunications link is solved.

Because of standards...

...personal computer hardware and operating system software, servicing thousands of cataloging searches a day is not a problem.

Web Database Background

A searchable online web **catalog** requires software to handle several distinct parts of the interaction between user and database. An understanding of these parts can be helpful in deciding among the several possible approaches to publishing a **catalog** on the web.

The table below lists and describes the six functional "layers" through which a user's interaction with a web **catalog** must pass. Fortunately, most vendors bundle the three layers, from database middleware down, into a single product. Some vendors even incorporate the web server and...

...FoxPro	Web server	Execute query and
	Filemaker Pro	or separate
	Oracle	database
	(proprietary)	server

The Options

So you want to publish a web **catalog** of your library holdings. The choices are these:

1. Buy the web OPAC module for your local library system, if one is available
2. Locally mount a non-real-time, stand-alone web OPAC
3. Subscribe to a web OPAC publishing service
4. Rely on a web union **catalog**

If you have good Internet connectivity, sufficient hardware to support a web server, and a local automated library system that has a web OPAC option...

...system that is required is not that much less than for a real-time web module. Keeping things really simple probably means outsourcing the snapshot **catalog** in one of the following approaches.

A number of vendors offer complete off-site web OPAC publishing for a fee. Library Corporation has NetPAC. Auto...

...offers the service. A number of smaller and potentially less expensive vendors have gotten into the market recently. The cost and ease of maintaining the **catalog** vary widely. This is a good option for a library with no ability to locally host its own **catalog**. Often it is possible to obtain and utilize one's own distinctive domain ...or similar) to give the impression one's library is much better connected to the Internet than it actually is.

Most regional and statewide union **catalogs** now are available on the web. Increasingly, they incorporate a location-limiting option that allows a user to search the system as if it contained...
...vendors use exactly the same technology to serve users on the library's local area network as to provide OPAC access to someone searching the **catalog** from Singapore. A local area network that uses web technologies is often called an intranet.

This is an area of controversy in the developer community...can use them. Increasingly, local systems are supporting USMARC authority records as a mechanism for defining See and See Also reference structures within a local **catalog**. Assume nothing, however. If this system capability is important to you, make sure the vendor of your local system demonstrates and documents it.

Patron File...

...by the vendor to unlock each application.

GENERAL OPERATION

System functionality is delivered in two modules: Concourse proper, which supports data management, cataloging, circulation and **catalog** searching functions; and OPAC which is designed to be run from public workstations and provides searching capability only.

User Interface

Concourse provides three overlapping user...Maintenance, where backups are done and database indexes may be rebuilt; Searching, from which four different types of **catalog** query may be initiated; Activities, which launches administrative, cataloging, circulation and patron file functions; and Reports, which produces lists and statistical summaries of system transactions...

...in the picture brings up patron functions, while the books and the computer on the right side of the picture both evoke a set of **catalog** search choices. The drop slot in the circulation desk activates the Check-In function. Clicking on the door to the work room leads the user...had not been implemented as of the version of the software that I tested.

The Card Image tab shows what users of the public access **catalog** will see when they retrieve this record. The MARC tab

(Figure 6) illustrates the MARC record built by the user in the course of interacting...school libraries as well, would benefit from enhanced manageability of the collection and retention of information about the use of items by specific patrons.

PUBLIC **CATALOG**

The OPAC module, shown in Figure 10, provides stand-alone **catalog** searching capabilities. Three searching options are supported: Kid's Search, Easy Word Search and Expert Search. Staff users have access to the same capabilities using...

...bibliographic details and availability in a horizontally scrolling format (Figure 12). Highlighting a line and clicking Full Info display details about that item in a **catalog** card format. Results may be sorted by clicking the Sort button and specifying sort criteria, or even more quickly by clicking on the column heading...and "Maine" as a subject word, nothing is retrieved. If they are both specified as keywords, however, we get back the single title in the **catalog** that carried the first word in the title and the second as part of a subject heading (Figure 15).

(Figures 14-15 ILLUSTRATION OMITTED)

The...

...will also affect the usefulness of broadcast searches. In heterogeneous environments, perhaps within a school district with multiple libraries each equipped with Concourse, the virtual **catalog** that results from this kind of combined search may have great value. Concourse with eHost constitutes one of the least expensive library-oriented Z39.50....

...is the objective, Book systems offers the Webrary module. Anyone with a common web browser and access to the Internet may search the library's **catalog** using the Webrary interface.

EASE OF USE

Concourse is easy to use. The interface, including the multiple options for initiating a number of major system...

...Macintosh or Windows \$2,400; Site license for Macintosh or Windows \$3,400; Cross Site License for Macintosh and Windows \$4,000; MARC CD-ROM

Catalog Database \$700/yr with 3 updates.

SYSTEM REQUIREMENTS

Hardware: Minimum (Windows) Intel 486 computer, 66 MHz minimum; Windows 3.1 or higher; 4 MB of...name. Library World 98 was shipped near the end of 1998.

CASPR is also in the services business, hosting a library's batch-updated web **catalog** on its central site. Access to a large Library of Congress MARC cataloging database is provided at no additional charge over the base cost of \$365/yr for the web **catalog**.

INSTALLATION
Library World 98 Silver comes on three floppy disks. The installation is simple and straightforward. The user is allowed to override the default installation...

...edge of the screen. Here, the righthand pane displays a scrolling list and the icon selected in the lefthand pane determines whether the list shows **Catalog**, Patron or Circulation information (Figure 2). Editing a bibliographic record begins by selecting the **Catalog** icon, then clicking on the selected title. Interactions with the patron and circulation files are begun in an analogous fashion. The toolbar Find, Add, Print...

...the Options button in the lefthand pane of the screen. Settings are divided into four categories: General, which applies to the system as a whole; **Catalog** options; Circulation options; and options that govern the behavior of the LibraryExplorer public access **catalog** module (Figure 3).

(Figure 3 ILLUSTRATION OMITTED)

General options are organized into four tabbed pages. Library name, address, phone and hours of operation information are...in circumstances where one wishes someone to do one task but not the other. Users may be allowed to view (or read) the patron or **catalog** databases yet be constrained with respect to making changes through adding or editing records. Figure 5 shows the interface for defining a new user. (Figures...

...are easy to use, with powerful and open- ended options for creating unlimited numbers of new reports, is an excellent feature.

(Figure 6 ILLUSTRATION OMITTED)

Catalog configuration will be discussed in the section on cataloging and data management, below. Circulation settings will be treated with the general discussion of circulation functionality. Explorer set-up will be described in the public access **catalog** section.

DATA MANAGEMENT AND CATALOGING

Configuration

The underlying system configuration for the cataloging module determines in large measure how it behaves, what it looks like and what choices it offers the user. The four tabbed pages involved are reached by clicking Administration, then Options and finally **Catalog**. The default Call Tag value, the local call number position, is 082...

...would cause the cataloging module to alert the user whenever a new subject or name heading is entered that is not already present in the **catalog**. The author expected the automated equivalent to pressing Ctrl-E in any one of a group of authority controlled fields, when a change is made...

...that must be initiated from the File menu, ran at 1,500 items per minute.

Export works on one or more records retrieved in a **catalog** search and selected by clicking the check box adjacent to each desired citation. One has the option of exporting in MARC, with or without use... icon, which brings up an important and initially confusing dialog box, shown in Figure 9.

(Figure 9 ILLUSTRATION OMITTED)

Every MARC subfield defined for the **catalog** is shown, along with an indication of whether it is configured to be indexed and whether it is included in keyword lookups. Note that these...

...supported. What if one is wondering if the name or subject heading that one is entering is exactly the same as that already in the **catalog**? The Expand command, activated by pressing Ctrl-E, displays a scrolling pick list of headings used in the field where the cursor currently resides, if
...
...

...inserted in the MARC record leader, e.g., book, manuscript, score, etc.

Icons across the bottom of the screen enable the user to view a **catalog** card representation of the current record, the label set that Library World can print for the item, and the barcode it would produce if called upon to do so.

The lower portion of the screen does double **duty**. When the button with the icon resembling a sheet of paper is depressed, the window provides access to item information. LibraryWorld stores a single bibliographic...the data element wherever it is present.

Related Cataloging Products

"The LibraryWorld MARC For Schools CD-ROM contains over 600,000 monograph records from the **Catalog** Card Company. All records are in MARC communications format with Sears subject headings." One may search by
first word of title combined with last name...

...set of tabbed screen forms accessed by selecting Administration from the opening screen, then Options and finally Circulation (Figure 11). LibraryWorld 98 uses the term **Catalog** Circulation Number for the barcode number assigned to an item in the collection. The first tab displays the next available **Catalog** Circulation Number and allows one to change it. One might wish to do this in order to place a series of new acquisitions in a...
...above.

Patron Information

Management of patron information constitutes a separate Patron module within the Administration portion of LibraryWorld 98. The interface

resembles that for the **Catalog** module. A screen full of patron records is displayed and icons running down the right side of the screen allow one to Find other patrons...and move a particular patron up or down in the list, effectively changing the order in which the title will be offered to patrons.

PUBLIC **CATALOG**
Configuration
The Explorer OPAC interface resembles the first screen seen by the user, shown earlier in Figure 1, with one exception. In an unattended public...the syntax in sufficient detail to allow a staff user to modify the call number ranges and labels as one might see fit.

Searching
The **catalog** search interface is called LibraryWorld Explorer. It is built into LibraryWorld, but is also provided under the LibraryWorld site license for use on workstations with...

...term "cat" will retrieve only records with that term as a separate word. The search term "cat?" will retrieve not only "cat", but also "cats", "catalog", "catwalk", etc. In addition to righthand truncation, which is commonly supported in many **catalogs**, LibraryWorld also offers lefthand truncation, whereby "?cant" retrieves not only instances of the word "cant" but also "significant", "mendicant", etc.

Of the six search approaches...was not provided as part of the Silver package.

EASE OF USE
Simplicity and complexity are both to be found in LibraryWorld. The public access **catalog** interface is straightforward and readily understandable. Some will find it simplistic--at least until they select the Expert Searching icon. Yet, the MARC-based cataloging...Novell Netware 3.1 or higher, Windows NT 4.0 or higher.

SUPPORT
Annual support includes e-mail, fax and phone support from staff on duty 5:00 a.m. to 5:00 p.m. Pacific Time; access to weekly online real-time chatstyle user group meetings; software updates and patches...

...edge of the screen. Here, the righthand pane displays a scrolling list and the icon selected in the lefthand pane determines whether the list shows **Catalog**, Patron or Circulation information (Figure 2). Editing a bibliographic record begins by selecting the **Catalog** icon, then clicking on the selected title. actions with the patron and circulation files are begun in an analogous fashion. The toolbar Find, Add, Print...

...the Options button in the lefthand pane of the screen. Settings are divided into four categories: General, which apply to the system as a whole; **Catalog** options; Circulation options; and options that govern the behavior of the Library Pro Explorer public access **catalog** module (Figure 3).

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General Options are organized into four tabbed pages. Library name, address, phone and hours of operation information is...

...in circumstances where one wishes someone to do one task but not the other. Users may be allowed to view (or read) the patron or **catalog** databases, yet be constrained with respect to adding or editing records.

Figure 5 shows the interface for defining a new user.

(Figures 4-5 ILLUSTRATION...are easy to use, with powerful and open-ended options for creating unlimited numbers of new reports, is an excellent one.

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Catalog configuration will be discussed in the section "DATA MANAGEMENT AND CATALOGING," below. Circulation settings will be treated with the general discussion of circulation functionality. Explorer set-up

will be described in the section on the public **catalog**.

DATA MANAGEMENT AND CATALOGING

Configuration

The underlying system configuration for the cataloging module determines in large measure how it behaves, what it looks like and what choices it offers the user. The four tabbed pages involved are reached by clicking Administration, then Options and finally **Catalog**. The default Call Tag value, the local call number position, is 082...

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...that must be initiated from the File menu, ran at 1,500 items per minute.

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icon which brings up an important and initially confusing dialog box, shown in Figure 9.

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...additional editing features are supported. Wondering if the name or

subject heading one is entering is exactly the same as what is already in the **catalog**? The Expand command, activated by typing Ctrl-E, displays a scrolling pick list of headings used in the field where the cursor currently resides, if...

...inserted in the MARC record leader, e.g., book, manuscript, score, etc.

Icons across the bottom of the screen enable the user to view a **catalog** card representation of the current record, the label set that Library Pro will print for the item, and the barcode it would produce if called upon to do so.

The lower portion of the screen does double **duty**. When the button with the icon resembling a sheet of paper is depressed, the window provides access to item information. Library Pro stores a single...set of tabbed screen forms accessed by selecting Administration from the opening screen, then Options and finally Circulation (Figure 11). Library Pro uses the term **Catalog** Circulation Number for the barcode number assigned to an item in the collection. The first tab displays the next available **catalog** Circulation Number and allows one to change it. One might wish to do this in order to place a series of new acquisitions in a...

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PUBLIC CATALOG
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The Explorer OPAC interface consists of the first screen seen by the user, shown earlier in Figure 1, with one exception. In an unattended...the syntax is sufficient detail to allow a staff user to modify the call number ranges and labels as one might see fit.

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...term "cat" will retrieve only records with that term as a separate word.

The search term "cat?" will retrieve not only "cat", but also "cats", "catalog", "catwalk", etc. In addition to righthand truncation, which is commonly supported in many **catalogs**, Library Pro offers lefthand truncation whereby "?cant" retrieves not only instances of the word "cant" but also "significant", "mendicant", etc.

Of the six search approaches...

...The Library Pro Platinum package includes Library Web.

EASE OF USE

Simplicity and complexity are both to be found in Library Pro.

The public access **catalog** interface is straightforward and readily understandable. Some will find it simplistic--at least until they select the Expert Searching icon. Yet, the MARC-based cataloging...5,000 to \$15,000 per site based on network configuration; Alexandria 3 - \$2,000 to \$8,000 per site based on network configuration; Kids **Catalog** - \$995; Rapid Retro - \$895; SmartMARC Kit - \$895.

SYSTEM REQUIREMENTS

Hardware: Macintosh librarian workstation: PowerPC or Macintosh G3, 32 MB RAM; Windows librarian workstation: Pentium, 32...its own window. Patrons, Orders, Budgets, Vendors, Subscriptions and Routes are self-explanatory. The Items choice actually activates Alexandria's cataloging functions. The public access **catalog** interface, called Alexandria Researcher, appears upon selection of the Search option on the menu. Bulletin Board allows staff users to add and remove announcements visible to patrons searching the public **catalog**. In most cases, a menu bar option offering navigational and other capabilities specific to the current window appears when that window is active. If necessary...

...triggers other school-specific functions and defaults.

Orders tracks the Bill To and Ship To addresses of the library, its budget year, applicable local sales **tax** rate, whether received items should immediately be added to the collection, whether line items on orders should be sorted by title, and boilerplate text for...user groups. Some libraries may wish to give every staff member an individual ID and password, with a group assignment corresponding to that person's **duties** within the library. Others may give a common ID to everyone who performs a particular set of functions, essentially one ID and password for each...

...except passwords and administrative preferences. The Library Staff group is only excluded from preferences, passwords, import/export and utilities.

A Library Aide can search the **catalog** and handle all circulation tasks including overriding circulation settings if required, but is

excluded from all else. A Student Aide has the same privileges except for override permission. A Researcher has access only to the public access **catalog**, while Self Service Check Out and Self Service Book Drop are constrained narrowly to those functions, respectively.

Some security conscious libraries may miss the ability...

...s own tab-delimited format. One has an option of selecting records to be exported, based on a variety of criteria or exporting the entire **catalog** file.

Cataloging

Alexandria 5 supports both ...date of last modification of the record and purchase date. A check box setting determines whether this information will be viewable by users of the **catalog** as well.

The MARC View editor is rudimentary in comparison to similar facilities offered by other vendors (Figure 2). It offers neither pick lists of...

...any valid text character. In general, you will not need to edit indicators for use with Alexandria." If one never contributes records to a union **catalog**, never splits a collection and sends some records to another system running another automated library system, and never migrates away from Alexandria, this advice may...by a wide variety of criteria, as shown in Figure 7, and sorted in any of five index orders.

(Figure 7 ILLUSTRATION OMITTED)

PUBLIC ACCESS CATALOG

The public access **catalog** is called Alexandria Researcher. It features Simple and Expert modes.

Configuration

Among the options that may be specified from Edit...lacking punctuation, e.g., "Korean War 19501953" for what would normally be displayed as "Korean War--1950-1953".

WEB COMPATIBILITY

Alexandria 5 includes a web **catalog** facility as a standard product component. From Edit...

...Web, an administrative user may specify the following elements of the web **catalog** interface: Port ID, Institution URL, Heading Text, Footing Text, About Text, Hold Comment Text, Reservation Comment Text and Patron Status Text. Also controlled from here...

...in its easy interface and provides insufficient user assistance in its MARC mode; and lack of a searchable Help facility.

Follett Circulation Plus For Windows/ **Catalog** Plus For Windows

Vendor: Follett Software Company

1391 Corporate Drive

McHenry, IL 60050-7041

telephone (800) 323-3397 or (815) 344-8700

fax (800) 807...

...Pricing: Circulation Plus Single User for Macintosh or Windows, \$1,395; Circulation Plus Network Version for Macintosh, Windows NT Server or Novell Server, \$1,395; **Catalog** Plus Single User for Macintosh or Windows, \$1,395; **Catalog** Plus Network Version for Macintosh, Windows NT Server or Novell Server, \$1,395; Network fee allowing unlimited use of Circulation Plus and/or **Catalog** Plus on a LAN in a single building, \$1,470; Bundle: Circulation Plus, **Catalog** Plus and network fee, \$3,590. Additional platform (Windows or Macintosh) OPAC Search Module, \$595. Z39.50 Server, \$495. WebCollection Plus for Windows, \$1,795...three times a year, mailings, downloads from web site and exclusive discounts. Annual support charges: Circulation Plus Network Support, \$240; Circulation Plus Single User, \$170; **Catalog** Plus Network Support, \$240; **Catalog** Plus Single User, \$170; WebCollection Plus for Windows, \$180.

BACKGROUND

Follett Software Company was one of the pioneers in providing automated library system software on personal computers. First released for the Apple II, Circulation Plus and later **Catalog** Plus became one of the most popular DOS-based systems on the market. In the early 1990s Follett rewrote the original product, again focusing on the DOS platform.

This product became known as Circulation Plus and **Catalog** Plus for DOS in Unison.

With increasing demand for graphical user interfaces in general and Microsoft Windows support in particular, Follett developed a versatile new client/server product. The Circulation Plus/**Catalog** Plus for Windows package relies on a bundled FairCom server-ironically, the same product that handles the internal database drudgery for arch-rival Winnebago Software...

...network fileserver. In networks of more than a handful of computers, performance will be enhanced by employing separate machines for each task.

Next, Circulation Plus, **Catalog** Plus and whatever other client software one has licensed are installed on the network workstations that staff and patrons will use to interact with the...

...Site menu option enables control over information used to identify the library in various screens and reports, the list of upcoming events displayed through the **catalog**, a wide selection of barcode processing settings, and passwords.

Circ/Cat Plus password settings are fewer and less granular than those of many other systems they control.

GENERAL OPERATION

User Interface

The functionality of the Circulation Plus/**Catalog** Plus package

is bound together at the operating system level rather than within a single Follett-provided shell. Figure 1 shows the Windows program group...

...are to be ignored as search terms.

Templates

Templates come in two varieties: bibliographic and authority.

Their purpose is to ease the creation of new **catalog** records by supplying a framework of the most common MARC standard tags, subfields and indicators into which to enter data. Record content may also be...as well.

Creation of

additional special purpose templates is not supported, however.

MARC Import/Export

During import, incoming records matching a record already in the **catalog** will either overlay the existing record or be ignored, based on the Duplicate MARC Records setting selected by the user immediately before confirming an import operation...

...Copy information may be exported with the records, in the 852 field, or

not. One may direct that exported records also be deleted from the **catalog**. This last feature should be of help in situations where a school library collection is split as part of reorganizing grade levels across schools.

Cataloging...all authority records and construct it anew.

Cross-reference support is intelligent. If the main heading in an authority record isn't used in the **catalog**, none of the See and See Also references that it defines will appear in the OPAC. As soon as the main heading is assigned to...per page or two. Reports may be previewed on

screen, printed to a text file, or sent to the printer.

(Figure 7 ILLUSTRATION OMITTED)

PUBLIC **CATALOG**

Configuration

The File...

...a screen with near misses in that format. Not that the typical library user is likely to miss it, but the default configuration of the **catalog** does not permit viewing a MARC format version of a record.

(Figure 10 ILLUSTRATION OMITTED)

Power search compensates for the shortcomings of simple keyword searching...a feature that allows a user to temporarily store citations, consisting of title, author, imprint, call number and notes, for selected items while searching the **catalog**. Citations must be selected individually. It is not possible to highlight multiple lines in a result list and store all the citations in a single...

...of the OPAC reaching out into cyberspace.

A Z39.50 server component is also available as an option, should a

library wish to publish its **catalog** utilizing that protocol.

OTHER FEATURES

Inventory
Follett emphasizes the inventory process. Indeed, an entire module is dedicated to the annual process of determining which materials...

...however.

In short, after some initial design acculturation, Follett is easy to use.

DOCUMENTATION

Though I worked with the release version of Follett Circulation Plus/
Catalog Plus 4.0, the documentation had not yet been printed. The Adobe Acrobat version of the 480-page manual that I used appeared to be... exactly what was desired.

Other report options include lists of items overdue or on reserve; lists of library clients; monthly statistics; annual statistics; generation of **purchase orders** for marked items within the Acquisitions file; generation of printed overdue notices. In addition, one may use the Quick Report editor to design new reports...dynamically reflected in the MARC display.

This selective online source-record archiving creates ambiguities that come to a head when exporting records to a union **catalog** or in preparation for a migration to another automated system. Which record does one want? Why, the most complete and up-to-date, of course...

...the Modified L4U MARC File or the Originally Imported USMARC File.

MARC record handling would be improved by tying the MARC archive directly to the **catalog** editor and providing full support for preservation and editing of any incoming MARC ...way will one be able to view and export a MARC record that is both the most current and the most complete possible.

Cataloging

Existing **catalog** records are edited with the Modify...

...that manner. Or, one may also scroll through the record list and double-click on any record for which an editing screen is desired.

The **catalog** editing interface consists of seven tabbed pages (Figure 6). The Main Screen encompasses most of the data elements. Subjects are handled separately and under authority...

...may have assigned any of a number of statue values in lieu of the default "Arrived". Completing the process and moving the record into the **catalog** database require an additional step. One must select Modify ...

...item along with any others that are to be added, and click the Poet

button. Only at this point is the record copied to the **catalog** database and deleted from the acquisitions file.

It should be noted that L4U does not support the concept of separate bibliographic and item records. Multiple...

...data differentiated by barcode, copy number and possibly other item-specific data elements. This results in the listing of duplicate items in response to some **catalog** searches.

It is important to understand operation of some of the other buttons on the browse screen in Figure 4. The Order By button allows...excluded from that process.

Global Changes

The browse screen in Figure 4 contains two buttons that can be used to effect global modifications of the **catalog** database. Authorities displays the user's choice of four authority files: authors, title, editors/illustrators, and series. Double clicking a heading within the chosen authority...

...at the circulation desk IS dictated by selections at the bottom of the screen.

(Figure 7 ILLUSTRATION OMITTED)

If the staff wishes and local privacy law or practice do not dictate otherwise, one may select File...every purely numeric scanned value is to be interpreted as an item barcode. If a match is found in the Library File (i.e., the **catalog** database), the item is immediately checked out to the current client and brief confirming bibliographic information is shown in the lower right of the screen...alert appears and the staff member is given a choice of viewing prior reserves, allowing the circulation to go forward or disallowing the transaction.

PUBLIC CATALOG

Configuration

Values on the OPAC Settings page, reached from the File...in the OPAC when the user selects the Messages icon. A basic word processing package is built into L4U for convenience use by staff. The **Catalogue** Maker option creates a printed listing of the entire collection.

EASE OF USE

Windows users will find that L4U takes some getting used to for...is built on top of this speedy database management and application development system widely used in small business.

The system consists of 11 networkable modules: **Catalog**, Circulation, OPAC, MARC, Text to MARC, Acquisitions, Notices/Inventory, Telecom, Patron Import/Export, Patron Reports and Security. LIBRARYSOFT is

an inexpensive system, particularly considering that...MicroLIF '87 formats both require translation to that proprietary format. The MARC module performs both functions, translating an incoming file, then loading it into the **catalog** database. The way it does this, however, is far from self-explanatory.

For MicroLIF, one works down through the options on the Acquire Text menu...

...one may simply make the changes in the MARC field mappings and hit the

Display Converted Data button again. The final step, loading into the **catalog**, is accomplished by clicking the Add to Database item on the menu bar. Contrary to common practice, this carries out the operation immediately and without...derive either from headings entered in each position (the first subject, the second subject, etc.) in previous editing sessions, or from terms manually added from **Catalog**

Descriptors: ...Online catalogs--

19990701

12/6,K/62 (Item 4 from file: 47)

DIALOG(R)File 47: Gale Group Magazine DB(TM)

(c) 2010 Gale/Cengage. All rights reserved.

05407731 **Supplier Number:** 55283447 (USE FORMAT 7 OR 9 FOR FULL TEXT)
INTEGRATED LIBRARY SYSTEM SOFTWARE FOR SMALLER LIBRARIES.(Software Review)(Evaluation)

March , 1999

Word Count: 48241 **Line Count:** 03882

...more than approximately \$10,000 (\$20,000 for products aimed at special

libraries) for a software license sufficient to handle cataloging, circulation and public access **catalog** functions on a five-machine local area network.

A small library, for our purposes, is one whose needs and maximum automation budget can be met...it is not fair to compare systems which offer wildly different sets of features. Thus, only products offering, at minimum, cataloging, circulation and public access **catalog** functions are considered in this set of reviews. Further, as a measure of sophistication and recognition of basic bibliographic standards, the systems had to be...

...part of this report is scheduled to contain reviews of these products:

Book Systems/Concourse
CASPR/Library World

Chancery/Library Pro
COMPanion/Alexandria
Follett/Circulation/**Catalog** Plus
Kelowna/Library 4 Universal
Maxcess/Verso
Nichols/Athena
Precision Computers/Surpass
TKM/Microcat
Winnebago/Spectrum

The following vendors were in the throes of major...questions through

ahead of time and be able to answer succinctly and convincingly.

With respect to an OPAC, the generic responses might include: An automated **catalog** provides powerful new ways to search for information. It makes it possible to find and use parts of the collection

that would otherwise be unknown and inaccessible. **Catalog** access can be extended (with most systems) to users connecting from home, work or school, thereby extending the library's reach into the community that supports it. Upon locating an item in the **catalog**, one knows immediately whether it has been checked out or is theoretically available

on the shelf. The elimination of card typing and filing will free...

...of creating a recorded description of bibliographic items in the collection, designating access points by which a user might search for each

item in the **catalog**, and assigning a physical location to the item in conformance with some classification scheme. This process can be speeded up through copy cataloging-employed high...

...service to locate and download an existing record. Copy cataloging dramatically reduces the intellectual effort called for locally and the amount of time necessary to **catalog** materials. All this economy notwithstanding, the editing facilities of the local systems cataloging module also allow local record augmentation and the creation of original cataloging...

...and serials control make it easier to monitor library materials expenditures, handle receiving and claiming of materials, pass descriptive and holdings information along to the **catalog** and the circulation system, collect useful management statistics and generally manage the business of buying and processing materials for the collection. Savings in staff time...

...do in your library if 10 hours of additional staff time suddenly became available every week? What are the five biggest headaches with the current **catalog**, circulation system, acquisitions routine?

DO BACKGROUND RESEARCH

An automated library system is not a panacea. It can help your

library provide better service to its...in one instance, involve internal support for import of USMARC authority records and their use to implement a system of cross-references within the public **catalog**, with global control of name and subject headings thrown into the bargain. In the next product it may simply connote the availability of a pick...Where GUI?

The first fallback of the MS-DOS die-hards was that a GUI was fine for the general public who used the library **catalog** only occasionally, but that staff were better off with the character-based interface. This view made a virtue out of necessity. After all, developers had...
...overall appeal of their product.

However, staff members are once and future members of the general public themselves. Design elements that made learning the public **catalog** easier could also make learning other staff functions easier. Cataloging could benefit from the ability to cut and paste text.

Circulation staff could benefit from...

...speaking, use of the MARC format for bibliographic data records has these advantages:

- MARC saves time and money.
- * Copy cataloging is faster than creating a **catalog** entry from scratch
- * Most book vendors offer MARC data records for a modest charge
- * MARC records are becoming available inexpensively and even at no

cost on the Internet

- MARC makes quality and consistency easier to achieve.
- * Most of the time, original **catalog** copy from the Library of Congress or some other contributor to a large cataloging database such as

OCLC will be of good quality.

- MARC makes cooperation and migration easier.
- * Libraries wishing to contribute records to a shared **catalog** can do so easily if they are able to export USMARC records. (Some cooperative programs can also accept non-MARC records to some degree, but

...
...capability is nil. If the special library's bibliographic data are unlikely to be contributed at any time in the future to a larger combined

catalog, or if migration to a MARC-oriented system in the future is inconceivable, the argument for export capability is weakened.

The bottom line for special...tools that can ease some of the burden. Nevertheless, client software management constitutes an ongoing burden with a client/server system.

Now consider the library **catalog** and the expectation of users that they should be able to access it from home. How many thousands of copies of client software will one...

...the world to dispense with proprietary client software entirely on three-tiered systems. That is exactly what library systems vendors have done in creating web **catalogs**.

In comparison to proprietary client software, a web browser is a "thin client." However, debate rages as to how thin is thin enough? Computing devices...

...PCs is yet to be determined.

The best bet is that larger libraries will eventually buy thin client devices as circulation workstations and as dedicated **catalog** workstations, but that smaller institutions will opt for PCs because of the greater flexibility they offer.

BiblioTech Pro

Vendor: Comstow Information Services, Inc.

249 Ayer...where that list is created and may be modified.

Sequence Numbers controls the generation of automatic values for Citation ID, Copy ID, Authority ID and **Purchase Order** number.

A new sequence may be inaugurated by simply entering a new starting value

that is outside the range of numbers already used.

Dump Data...for it, then click on the Ordering button. An order form opens up, ready to fill in and use as the basis for printing a **purchase order**.

The final Record Update tab, Serials, displays information about recently received copies of issues of the currently selected serial title and provides a link to...

...which it is used.

(Figure 3 ILLUSTRATION OMITTED)

Clicking on the Relationships button displays heading correlations and allows one to modify them. Clicking on the **Catalog** References button displays a pick list of all the titles in the database that use this particular heading. Selecting one of these titles and clicking Update Catalog Record opens up the Indexed Fields window, allowing modification of assigned headings for that title. The Thesaurus system is a powerful and sophisticated system for...or Returned (checked in). Scan operates in a similar manner with respect to all items checked out to a given user, whether overdue or not.

Catalog Snapshot, the only choice under the Utilities item on the Circulation menu bar, provides a quick cross-reference between CID and associated Item ID values...

...the same information in less fancy format ... Our licensing precludes us from sending out Report Builder and Results with demo version that you had."

PUBLIC **CATALOG**

The Searching option on the BiblioTech Pro Main Menu supports two

inquiry approaches: a Global Search on subject, title and name headings and an Index...

... pulldown allows one to filter a large result list by branch location and/or by material type.

WEB COMPATIBILITY

An organization wishing to publish its **catalog** on the World Wide Web may purchase the BibSpeed web ...module and in particular its Holdings tab, which features an Order button with which one may add the current item to a new or existing **purchase order**. When all the desired materials have been entered on a given PO, it can be printed and sent to a vendor. When the materials arrive...

... present in the system. After receiving, which consists of adding a barcode number and date received to the Holdings screen, one may proceed to

final **catalog** editing, as required.

EASE OF USE

The user interface follows common practice closely enough to be a source of both assistance and confusion to new...

... functions with support for additional needs common to corporate and other special libraries. Its depth and versatility make up for some interface peculiarities.

PC Card **Catalog**: Windows

Vendor: Diakon Systems

3801 Glenmont Drive

Fort Worth, TX 76133-2955

telephone (817) 292- ...mceowen@mail.fastlane.net

web <http://www.fastlane.net/~mceowen/diakon>

Version: 2.50a

Demo: 30-day demo version available.

Modules and Pricing: PC Card **Catalog**: Windows \$189, Public Access **Catalogs** for PCCC: Win \$99 per **catalog** workstation, Circulation module \$219.

SYSTEM REQUIREMENTS

Hardware: PC running Windows 95/98/NT.

Operating System: Windows 95/98/NT.

LAN: Windows NT or peer-to...

... PCCC, PCCCpro and Library Manager, Diakon portrays its newest software as "designed for the small library (25,000 items or less)."

INSTALLATION

The PC Card **Catalog**: Windows module installs quickly and easily, in a manner typical of contemporary Windows software packages. The user may specify the drive and directory for system...

... conversion procedures described during installation and in accompanying printed documentation. New users will be mainly interested in the small sample database designated as the default **catalog**. First-time users are encouraged to experiment with PCCC: Win using the sample data before following the Read Me text file instructions to designate a different

"live" **catalog** file.

Software is compact by today's standards, taking up just 1 MB of disk space, with the sample **catalog** files consuming another 1.2 MB.

GENERAL OPERATION

The PCCC interface generally follows the Windows model. All actions

start from the menu bar that runs across the top of the PCCC window (Figure

1). One may begin a **catalog** search, initiate a circulation transaction, generate a list of authors in the database, enter a record in

the bibliographic database and freely switch among the...

...to become comfortable with this more powerful approach.

Report generation capabilities are not extensive. The Listing menu

choice (Figure 3) allows display of the entire **catalog** database or a user-specified alphabetic or numeric range of records sorted and

specified

on the basis of title, author, subject, accession number, shelf (call...).

...characters

9. Publisher - 15 alphanumeric characters

10. Source - 10 alphanumeric characters

11. Extent - 24 alphanumeric characters

12. Remarks - 30 alphanumeric characters

13. Library of Congress **Catalog** Number - 15 alphanumeric characters

14. ISBN - 13 alphanumeric characters

15. Edition - 5 numeric characters

16-20. Notes 1-5 150 ...entry of headings, the user may direct

the

system to maintain a list of all subject headings and/or all author headings used in the **catalog**. During data entry or editing, the user may click on a button next to the respective field and select from among

the headings that appear...

...in PCCC: Win for placing holds on items in circulation. No record is kept of the number of times a given item has circulated.

PUBLIC **CATALOG**

The basic PCCC: Win package contains full public access **catalog** functionality along with administrative features for managing data and circulating materials. Since security for the entire system is dependent on a single password, however, there is no good way to

keep **catalog** users from exploring administrative functions if one provides public **catalog** access through the full version of the software. Instead, a library must purchase as many copies of the \$99 Public

Access **Catalogs** for PCCC: Win add-on (sold as PCCC: Pub) as the number of public, networked machines that it owns.

Installation of PCCC: Pub consists of...

...Win, then adjusting Utilities I Preferences on each one to reflect the registration number of the product and the local or network location of the **catalog** database.

The **Catalog** item on the menu bar contains four options: heading searches by author, title, or subject or keyword search. One may enter the term "Lindbergh" in the **catalog** window (Figure ...and execute it as a subject search, or switch search types at any time by means of the radio buttons on the side of the **catalog** search form. It is not possible to search all or a combination of heading types simultaneously.

(Figure 11 ILLUSTRATION OMITTED)

Keyword searching is available but...

...they are treated as a single character string, spaces and all. The range of a keyword search is determined by administrative settings applied to the **catalog**. Any combination of title, subject and notes fields may be designated for keyword indexing from the Utilities...

...controls for browsing matching items and selecting one for closer inspection are unusual. Everything is done with clickable buttons in the lower right of the **catalog** interface. At all times there is a "current title" at the center of the screen list of titles, indicated by boldface display. A button with...

...useless in this screen. There is not a vertical scroll bar to be seen anywhere. It is not possible to double-click on a brief **catalog** entry in order to pull up more detail about the title. Instead, one maneuvers the desired title under the boldface highlight and clicks on the
...

...indexed for keyword retrieval, is maintained as a text file called PCCCWIN.IGN. It resides in the same directory as the bibliographic data for the **catalog**. As there is no administrative access to the file from PCCC: Win, changes must be made using an external text editor.

WEB COMPATIBILITY

PCCC: Win...

...5

Demo: A free demo package is available on request.

Modules and Pricing: Prices of Cataloging, Circulation, Serials, Acquisitions, EasySearch, GoPAC (Graphical Online Public Access **Catalog**), GLAS @ccess (web OPAC) and Databridge (data import/export utility) modules vary by library size.

SYSTEM REQUIREMENTS

Hardware: Pentium 133 processor or higher; 32 MB...need only read

rights, except full control is required to use the Leave Message option and the Find option.

Web Environment: The GLAS @ccess web **catalog** module supports: 1) Windows NT Server 4.0 and Internet Information Server (IIS) 4.0, or Microsoft's Personal Web Server (PWS), either running on...

...32-bit Windows 95/98/NT. The upcoming version 3.x of GLAS will require a

32-bit version of Windows. GLAS supports cataloging, public **catalog**, circulation, acquisitions and serials functions.

With respect to Year 2000 issues, EOS International states that it provides "a comprehensive Year 2000 software warranty for GLAS..."

...installation of GLAS, GoPAC and @ccess consumes about 66 MB of disk space prior to creation of an actual database. If the GLAS @ccess web **catalog** is to be installed, one must follow the 15-step process detailed in the online help for installing ODBC and ADO components for The installation...

...27 links to constituent programs, help files and documentation.

Users

who have used Microsoft Visual FoxPro will recognize the fox icon representing the @ccess web **catalog** module. This is a tip-off that the entire package is built on FoxPro as the underlying development language and database manager.

GENERAL OPERATION

User...can switch between windows without limit.

Modularity

GLAS is more obviously modular in operation than many products. Cataloging, Circulation, Acquisitions, Serials, Utilities, the public access **catalog** and the GLAS @ccess web module must all be launched individually from the GLAS folder in the Start Menu (Figure 1). It is not possible...

...beginning at a specified position in the field and extending a specified

number of characters may be used as the source for a record's "Catalogue ID," i.e., bar code number. If this option is unchecked, the system will automatically generate a unique sequential control number

during import.

Handling of...

...record anomalies during the import process. If desired, trailing periods

on all fields that are mapped to the GLAS subject field may be removed during import. Optionally, the subject **terms** may be forced to upper case at the same time.

(Figure 3 ILLUSTRATION OMITTED)

...already in the collection, one may click the Add button without doing a search.

In either case, the user is given a choice of the **Catalog** Editor or the MARC Editor. The former is simply the interface we saw in Figure 4. The Author, Subject and Added Entry tabs are particularly...

...data entry and maintaining consistency of usage. Within each tab one clicks Add and a list of all the headings of that type in the **catalog** is displayed. Double-clicking on the heading and clicking the Add button attaches that heading to the item being cataloged. Where the heading one needs of tags, indicators and fields. An Item tab identical to that found in the **Catalog** Editor is also provided.

Authority Control

Under the Maintenance menu bar option, GLAS offers access to author, subject and added entry headings assigned to items in the **catalog**. Any heading on one of these lists may be edited directly, effectively imposing a global change on all records that bear that particular heading.

One...

...the Zero Item Usage Report would make these even more useful in evaluating which parts of the collection are active and at what rate.

PUBLIC **CATALOG**

Staff Workstations

All the main modules of GLAS support searching. While oriented to staff use, these capabilities are worth mentioning in the context of a special library or information center. Two interfaces to **Catalog** searching are provided: the simple Online interface and the more powerful and complex Find interface. An Online search consists of a text box in which...the title. Use of two-letter abbreviations for the searchable fields is required. Clicking the Info button displays the legend.

(Figure 9 ILLUSTRATION OMITTED)

Patron **Catalog**

GoPAC is a pure patron online **catalog** tool. It can be made available in unattended circumstances where one would not wish to have staff functions on view, notwithstanding password security measures.

It...

...require access to the other software modules.

WEB COMPATIBILITY

The optional GLAS @ccess module enables users of the World Wide Web to search a GLAS **catalog**. EOS specifies that this facility requires Microsoft Internet Information Server or Microsoft Personal Web Server, and Microsoft Internet Explorer as the web browser.

ADDITIONAL FEATURES...stores a wide variety of data in a single file, the Library textbase, with support from Supplier, Borrower and optionally ILL and ILLender textbases. The "**Catalog**" approach utilizes different textbases for different tasks and is better suited to environments with multiple staff members, a separate public access **catalog**, and a circulation system that utilizes bar code labels. The files used in this instance would be the **Catalog** textbase together with Supplier, Borrower, Loans, Serials and, optionally, ILL and ILLender.

The **Catalog** approach will be explored in this examination.

INSTALLATION

The DB/TextWorks CD-ROM can be used to install either the server or the client version...of text immediately initiates whatever action was associated with that line in the menu screen design phase. Inmagic supplies two menu screens that support the **Catalog** approach. Staff options are found on CAT...

...I transformed a file of 2000 records in 60 seconds, then imported it properly in 72 seconds.

Data Structure

Before modifying the structure of the **Catalog** textbase it is necessary to familiarize oneself with it. The following summary is excerpted from the report generated with the Textbase Information option of the...for heading searches, Word for keyword searches). Special filing rules, validation provisions and other sophisticated field-level particulars are noted where present. This is the **Catalog** textbase structure:

1. ID: Automatic Number (next avail=1, increm=1), Term
2. Class: Text, Term Special Filing: do not ignore leading articles
3. Label...

...Title No: Text, Term Special Filing: do not ignore leading articles
27. Internal Acct No: Text, Term Special Filing: do not ignore leading articles

28. **Purchase Order:** Text, Term Special Filing: do not ignore leading articles

29. Copies on Order: Number (strict, trail), Term
30. Requestor: Link (to 'Name' in textbase 'BORROWER...Special care

should be taken, however, to avoid tinkering with any field which is designated as a Link. Changes could completely disrupt the relationships among **Catalog**, Borrower and Loans textbases, making the Library Guide system inoperative.

Data Structure
Borrower file:

1. Borrower Number: Text, Term Special Filing: do not ignore leading

...

...Only, When Created), Term
Loans:

1. Loan Number: Automatic Number (next avail=2, increm=1), Term
2. Item Loaned: Link (to 'Bar Code' in textbase 'CATALOG'),
Term Special Filing: file numbers alphabetically Validation: single-only
3. Borrower: Link (to 'Name' in textbase 'BORROWER'), Term & Word Special Filing: do not use stop...the hands of clerical staff with little interest in learning the details, the circulation features implemented through Library Guide could cause confusion and consternation.

PUBLIC **CATALOG**

Choose author, title, subject or "Multiple Fields" searching from the default public **catalog** interface embodied in the CAT WELC.TBM file and a Query by Example (QBE) form is presented appropriate to the choice. The user types one...under the maximum cost criterion for inclusion in this series of reviews. Software to implement a five-workstation configuration offering circulation, cataloging and public access **catalog** functions just slips under our \$20,000 bar for special library-oriented products. A typical customer incurs additional costs for installation, training and implementation assistance...normally launched by clicking on the KLAS Login icon or choosing KLAS Login from the Start Menu. Four modules were active on my test system: **Catalog** Management, Circulation Control, Patron Services and Administrative Services (Figure 1). Grayed out icons included Authority, OPAC, Acquisitions, Serials Control and Reader Services. (Figure 1 ILLUSTRATION...)

...able to gain quick access to other modules from within a particular module. This feature operated inconsistently in my evaluation. Of the icons on the **Catalog** maintenance screen, only the one for Administrative Services actually did what was expected, launching the Administrative Services module. Acquisitions and Authority were not installed, so... ...2. One may specify permissions and passwords for each user authorized to work on the system, but only with respect to the System Administration and **Catalog** Management modules. Circulation Control and Patron Services are not covered, except insofar as a user name and password prevent access to the KLAS desktop and...

...or nothing, without a hierarchy that would allow specified users to modify only specified settings. There is a bit more flexibility with respect to the **Catalog** Maintenance module, in that permission for adding, deleting or updating a title, title codes, a MARC record or a copy record may be individually given...

...you read this review, however, keep in mind that the original cataloging portion of the Cataloging module has not been examined by this reviewer.

The **Catalog** Management module (Figure 4) consists of a single screen with seven tabbed pages: Title-Bib, Title-Coded, Full, MARC, MFHD, Stats and Item. The **Catalog** Management screen, unlike standard windows, is not resizeable. This is good in that it prevents inadvertent window resizing which can confuse and frustrate novice users...Notices.

Also on the drop-down menu but grayed out, presumably because they have not yet been implemented, are Block Maintenance and Batch Functions.

PUBLIC CATALOG

KLAS features a web-based public access catalog. Users on a local area network or coming off the web see the same user interface. Within a simple design, the OPAC supports a variety...

...for keyword searches. For many purposes, however, doing several quick single-term keyword searches is likely be a serviceable workaround.

WEB COMPATIBILITY

The public access catalog is ...an online help facility.

The printed material is another story. The 140-page Workbook/Reference Guide covers the general operation of the system and the

Catalog Management, Patron Services and Circulation Control modules quite well. Each function on each screen is explained in sufficient detail to allow one to quickly master...would be appropriate for sites where users search an unattended machine. A second "alternative" database may be specified should one wish to maintain two separate catalogs and switch between them.

(Figure 2 ILLUSTRATION OMITTED)

Security

LexWin supports assignment of separate passwords for circulation checkout and check-in; printing; program exit; packing...Place Hold. This

is particularly handy as a follow-on to a catalog search. Although the system went through the motions, the system apparently never actually recorded holds placed in this manner.

Reports and Notices

The Reports button...

...of all circulation activity for a user-specified date, list of heaviest

borrowers and most popular items, and statistics for a range of dates.

PUBLIC CATALOG

Four search approaches are provided' Type In Your Search, Browse the Indexes, Select All Records and, placed a bit further down the screen, Search Unindexed...

...individually for author, title, subject or call number; or one may search for a word or words in the title and subject fields of a catalog record. The Select All option serves to generate a scrollable list of the entire catalog in one's choice of sort order, from among author, title, subject, call number, bar code number and date entered into the database.

The final...the end of the term, e.g., "bag." ignores "Baghdad."

Browse the Indexes can be helpful in learning more about the terminology used in the catalog. If the Word index is in effect, one gets a scrollable list of every indexed subject and title word in the database, along with the...

...and selects one of them to work with in combination with the new search terms and the Boolean operator. With this feature, LexWin enables experienced **catalog** users to employ a set-based search strategy, combining results of previous searches in potentially powerful ways.

Novice

users may find this all a bit...

...still have utility as a "history" function, allowing access to previous successful searches without retyping.

WEB COMPATIBILITY

LexWin does not currently support publishing the library **catalog** on the web.

EASE OF USE

LexWin is harder to use than some other products. This is largely due

to the initial disorientation associated with...of Congress MARC cataloging

information on microfiche, the firm contrived a means of delivering the same data on discs, complete with DOS software to produce **catalog** cards and labels. The product was called BiblioFile and eventually was used

by thousands of libraries around the world. The firm subsequently branched

out into production of local and union **catalogs** on CD-ROM. Lately, both cataloging services and public **catalog** services have made the transition to the World Wide Web.

Along the way, the Library Corporation began work on a number of stand-alone software...

...has been plugged into Library. Solution to handle cataloging. A second

Windows client manages circulation tasks and includes course reserves.

In

contrast, the public access **catalog** module is entirely browser-based. Whether one is working from the server machine itself, another workstation on a local area network, or viewing the **catalog** across the Interne,, the interface is exactly the same set of web-based screens. Additional products are available as extra-cost add-ons: Library.

Serial...derived, notwithstanding the addition of any holdings data or unique record identifiers. Within the system, the MARC-based editor supports maintenance of MARC records.

The **catalog** module is based on ITS for Windows, a product also sold for use with various Library Corporation cataloging record services on CD (BiblioFile) and on...

...a Z39.50 client Internet client, allowing one to grab records from scores of Z39.50 servers and edit them for use in the local **catalog**.

MARC import is as simple as choosing File...

...the records in the file, one per line. One may highlight any number of lines, then use the Save option to save them to the **catalog** database. The Options...

...them on to the Z39.50 server. If a large number of records are to be processed, it is faster to utilize the Library. Solution **Catalog Utility**, however. This standalone Windows program allows one to import or export records en masse. It is also used to generate cross-references for the headings in the current **catalog** database.

Cataloging

Editing an existing record requires first that one use the Search function to locate it (Figure 2). In this instance, I am searching... ...defined, each with whatever set of default values and fields one may find useful. An 856 Field Editor eases considerably the task of creating proper **catalog** entries for online electronic resources, complete with embedded URL links. Keyboard macros may also be created for carrying out routine multi-keystroke operations with a...

...form or a new authority record for that heading is created. In Figure 6, two headings not previously established within the authority structure of the **catalog** have been flagged. By double-clicking on each in turn, the ...specific title, or multiple titles. Staff have control over priorities within the hold queue. Hold placement may traverse multiple branches or just one branch.

PUBLIC CATALOG

The OPAC module is attractive, powerful and highly configurable. Three searching approaches are supported. The opening OPAC screen (Figure 11) offers the novice user the...

...with more conventional search fields, Browse supports searches by call number, LCCN, ISBN, ISSN and GPO Number. A call number browse can help a skilled **catalog** user identify additional titles of potential interest based on the occurrence of call numbers among items that are known to be relevant.

Tucked away near...hold status and view their patron and circulation information generally.

WEB COMPATIBILITY

Library. Solution comes with two OPAC server systems suitable for publishing the library **catalog** on the Internet. The SilverNET web server supports access with a generic web browser. It is designed to operate in tandem with Microsoft Internet Information...

...mc2.sys

Version: 4.0

Demo: A "preview version" featuring screen shots of the program is available.

Modules and Pricing: Library Server \$329, Remote Card **Catalog** \$129 each workstation or 3 workstations for \$300; Remote Circulation \$159

each workstation or 3 workstations for \$400; MARC/AL Interface Utility \$89;

Remote Data Entry \$89.

The firm also offers an Internet **Catalog** service for \$120/year including one data upload, with a charge of \$25 for each additional data upload. As of this writing, information on this...

...at: <http://www.autolib.com/autohome.htm>

SYSTEM REQUIREMENTS

Hardware: Pentium 100--133 MHz, 24 MB RAM (32 MB RAM on server if Remote Card **Catalog** or Remote Circulation are in use), 30-50 MB for program files, 60 MB for data, with additional 100 MB free space.

Operating System: Windows...

...in any way color my evaluation of Auto Librarian, which until now I had never even seen. K.A.B.

INSTALLATION

The Server, Remote Card **Catalog** and MARC/AL Interface Utility modules come on one CD. Executing the CDMENU.EXE program kicks off installation. The Server component must be set up...

...C.; any new machine will fall into this category. Older machines, particularly those with multiple partitions, may have insufficient space

for Auto Librarian and the **catalog** database one builds with it.

Allowing the user to select the drive ...The vendor advises that if this

is an issue, "after installation the program could be moved to another drive location without any problem."

Remote Card **Catalog** is installed by mounting the Server CD in a LAN workstation and executing STARTM.EXE. The Auto Librarian Network Configuration utility is then executed and the network path for the **catalog** database is entered.

Remote Circulation comes on a separate CD and is installed in a two-step process. First, the CD is inserted in the...

...taken to the workstation computer and STARTM.EXE is run again.

Network configuration values must be entered in the same manner as for Remote Card **Catalog**.

GENERAL OPERATION

The User Interface

Auto Librarian gives a first impression of simplicity. While it uses

a tabbed interface (Figure 1) like many of the...Ctrl #

Cost

Copyright

Illustrator

Pages

Due Date Type: Regular, Overnight, Same Day, Special
Working with Book Records

The Books tab combines the functions of public **catalog** searching and cataloging. One uses the public search functions to locate a record, then the Edit and Delete options to manipulate the record.

Catalog searching is described in detail under Public **Catalog**, below.

Importing a record is done using an external program, the MARC/AL conversion utility. Although it is run outside Auto Librarian proper, it is ...author, subject, call number and book number. One may also generate a list of all missing books or all the subject headings used in the catalog.

A Reports With Filters option is offered for both Borrowers and Books. With it, one may use the Shazam Report Wizard, a database querying and...Circulation section of the Utilities tab, then specifying which history file is to be processed and both start and end dates for the deletion.

PUBLIC CATALOG

The Auto Librarian public **catalog** takes two forms. At very small sites with just a single computer, the **catalog** is found on the Books tab (Figure 1). It does double **duty**, allowing general inquiry of the books database and enabling a staff member to find a record in order

to modify it. In such a situation...

...out of the administrative side of the system. In libraries with multiple computers and a local area network, one would purchase as many Remote Card

Catalog packages as one had computers. The Remote interface lacks any tabs and omits staff-oriented option buttons but, in terms of searching, functionality is identical...

...Narrow search.

WEB COMPATIBILITY

In lieu of software that, with an appropriate Internet connection and web server configuration, would allow a library to publish its **catalog** on the Internet, (MC.sup.2) systems offers the Auto Librarian Internet **Catalog** service. It costs \$125 annually plus \$25/uploaded update, allowing libraries to determine the balance between currency and cost.

ADDITIONAL CAPABILITIES

In addition to spine labels and book pocket labels, Auto Librarian also prints **catalog** cards-albeit in a fairly peculiar format. Still, if a legacy card **catalog** will just not go away even after an electronic successor has come on the scene, this modest printing capability may be useful.

EASE OF USE...and TCP/IP networks; Appletalk.

Other Requirements: A licensed copy of FileMaker Pro 4.0 is required to support web publishing of the TLC catalog.

SUPPORT POLICIES

Technical support is available by e-mail, telephone, or fax on Mondays through Fridays, 9:00 a.m. to 5:00 p.m. Eastern...

...can handle any number of records but does not compute fines for overdue items and is not a MARC-based system. Therefore, TLC's catalog and circulation modules may not be appropriate for libraries in centralized school districts, university libraries, or public libraries." TLC is cross-platform, running on both Windows systems and Macs.

Users wishing to publish a catalog on the Internet will need to purchase a full copy of FileMaker Pro. On Point advises that additional benefits include the ability to customize screens and...

...will reside. Installation consumes about 8 MB of disk space before data are entered into the files. Experience with sample files suggests that the Catalog file grows by about 2 KB for each imported MARC record. This will vary, of course, depending on the level of detail in the incoming records...

...gain access to all system features, or the Minimenu button to bring up a simplified search-only menu for nonstaff users of the public catalog. The Minimenu is discussed in greater detail in the Public Catalog section below.

(Figure 1 ILLUSTRATION OMITTED)

Choosing Begin opens the main TLC menu (Figure 2), a grid containing three columns of choices represented by button icons...several additional end user interfaces, each with its own unique capabilities, are available for implementation in a similar manner.

DATA MANAGEMENT AND CATALOGING

The Catalog Menu (Figure 3) is the gateway to bibliographic data management in TLC. Reports supports inquiries and generation of lists.

Update is used to add, edit or...

...whether the incoming file contains a (distinctly non-MARC) carriage return at the end of each record.

When one clicks on MARC from the Catalog

...

...out during import, then loads the records into the file at the rate of about 1,500/minute. The final step, back at the Catalog menu, is to generate a new keyword index to the updated file by clicking the Keyword Index button.

TLC exports bibliographic records in a variety of...

...SYLK, DBF, DIF, WKS, Basic, Mail Merge, and HTML.

Cataloging

Cataloging, in the TLC universe, is the act of performing Update functions on the Catalog data file (Figure 4). From the Update Menu, one may select menu buttons to create new records, search for existing records, act upon records retrieved in...

...data entry layout for a book. The last choice allows one to enter

material into the database that will not show up in normal catalog **searches**. One could maintain an inventory of equipment or other materials that for one reason or another one does not want to publish as

part of the catalog **proper**.

(Figure 5 ILLUSTRATION OMITTED)

There are no cataloging aids such as pick lists of existing author or subject headings. The data entry formats are not...

...as two narrower terms, two broader terms and ten related terms.

Printed listings of the thesaurus may be distributed to assist users of the catalog.

Reports

The Reports option allows one to explore in detail the makeup of the Catalog **file** (Figure 6). To create a report one conducts a search, specifies a sort order for the results, and selects a presentation format.

These actions must...in that format but has no relation to the format selection for the next search. Searching is discussed in more detail in the

Public Catalog **section**.

(Figure 6 ILLUSTRATION OMITTED)

Upon clicking one of the presentation format buttons, the results of the previous search are displayed immediately in that format, in...

...button in Update (Figure 5) makes it easy to generate a new record with

the same field content from a record already in the catalog. The single bibliographic data structure used to handle records for all types of

materials in all their variety follows:

Abstract	Text	Short description or scope note...
----------	------	------------------------------------

...bar code of an item in the collection (Figure 8). A look-up is done automatically on each and information from the User and Catalog **files** is entered into the new transaction record. Buttons within the checkout screen allow one to view the number of items the current user has on...

...item in the collection. Libraries that do no use bar codes must instead

depend on unique classification numbers as the key element in linking Catalog **data** and Borrow data. A collection following this pattern would ignore the BC buttons.

(Figure 9 ILLUSTRATION OMITTED)

TLC's Borrow screen includes a field in name of the next person to receive the item.

PUBLIC CATALOG

Two principal search options are supported: full searching

within the staff module and simplified searching within the Minimenu. Even though the former is generally seen only by staff members, this section on the public catalog **seems** more logical than any other in which to examine TLC's searching features.

In conjunction with Reports or Update, three search choices are generally shown...

...series and/or words in the abstract field could also be valuable.

Search results may be sorted by author, title, date added to the catalog, **classification** number or bar code. Notably absent: an option to create a list of materials organized by subject term.

Minimenu

The Minimenu constitutes the generic public catalog **for** TLC. The default version grants the user three simple choices: Retrieve Citations, Retrieve Records or Exit the program. The retrieval options solicit search words identically...

...or combine searching across most major fields with self-checkout.

WEB COMPATIBILITY

Version 2.1 is the first to support web access to the catalog **from** the Internet or via an intranet. In addition to TLC software, web hosting requires a licensed copy of FileMaker Pro 4.0 for Windows or...

...the library information. On the lending screen, entering the bar code number of the item similarly fills in the bibliographic details based on the catalog **database**. Reports displays information about transactions currently in process. Disk backs up the ILL file and exports or imports ILL records.

Scheduling

The Schedule utility allows...

...contents of vertical file collections. Extensive descriptive information can be entered and searched through a keyword approach. Memo is a file separate from the Catalog, **however**. One must select Memo, then search through Memo Reports or Memo Update in order to find things.

This limitation can be eliminated, however, through use of the Copycat function on the Memo Update screen. With it, Memo records are loaded into the Catalog **file**, allowing one to search both files in a single step. Memo files have this structure:

Abstract	Text	Short abstract or scope note
AllKeys	...in the date of the next expected issue.	If desired, one may create records within the Serials module that can be transferred to the Catalog for searching along with the rest of the collection.

(Figure 10 ILLUSTRATION OMITTED)

The Orders file is the heart of TLC's approach to acquisitions.

New

...

...priced products can compete with TLC on a feature-for-feature basis. One distinction survives, however: no other product in this issue includes web catalog **functionality** at as low a price.3

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**05293272 Supplier Number: 53501780 (USE FORMAT 7 OR 9 FOR FULL TEXT)
GUIDE TO OUTSOURCING IN LIBRARIES.(Industry Overview)**

Sept, 1998

Word Count: 24643 Line Count: 02871

...Library of Congress assume responsibility for centralized cataloging.

Herbert Putnam implemented the idea in 1901 when, as Librarian of Congress, he announced the availability of **catalog** cards for books acquired and cataloged by LC.

Libraries have also sent out books for binding for many years. In 1905 the American Library Association...involved warrants, a visit should be made to the vendor's place of business. This will make it possible to observe the work being done, **including** the **condition** of equipment, efficiency of the work layout, and the overall working atmosphere.

Signing a Contract

Most vendors will seek to have a library sign a contract. The contract should be carefully reviewed to make sure that there are no unacceptable **conditions**. If not already **included**, a clause should be added incorporating the library's RFP or requirements and the vendor's response as addenda to the contract. In case of...in the next two sections.

A library requiring a system with five user licenses and access to acquisitions, serials control, cataloging, circulation, and patron access **catalog** software will pay approximately \$15,000 to \$18,000 per year to a service bureau. The figure, which is \$3,000 to \$3,600 per...The Library wishes to implement an automated library system which would include acquisitions, serials control, cataloging with cataloging support system interface, circulation, and patron access **catalog**. It envisions the installation of three patron access **catalog** stations and two staff workstations in the library. It also intends to have the patron access **catalog** available on the Web.

The Library is interested in outsourcing the activity;
specifically
it wishes to obtain proposals for a service bureau to provide the...
...software, and applications
software.

2. The software modules to be available are acquisitions, serials
control,

cataloging with cataloging support system interface, circulation,
and
patron access **catalog**.

3. Provide up to 10 days of on-site training in the use of the
modules.

4. All modules shall be available 82 hours per week during
library
operating hours; the patron access **catalog**
shall be available 168 hours per
week.

5. A complete database back-up-bibliographic, item, and patron
records-shall be maintained at all times.

6...

...release.

14. The library's financial obligation shall be based on the number
of

workstations in the library, which initially shall include three
patron
access **catalogs**
and two staff workstations. Vendor to quote the annual cost
for five user licenses.

15. There shall be no additional charge for Web access
to the patron access
catalog from outside the library.

16. It shall be possible for the library to add additional user
licenses

Quote the annual cost for each additional user...central
library,
and some 200 enter each of the branches. In order to meet its needs,
the
Library has deployed more than 20 patron access **catalogs** and 30

electronic access stations on an Ethernet LAN in the central library. In addition, there are more than 30 staff workstations on the LAN. Each of the branches has three patron access **catalogs**, five electronic access stations, and three staff workstations on an Ethernet LAN. The sites are connected via frame relay circuits, each currently 128 Kbps.

The network currently includes a/an -- automated library system.

All of the PCs have Web-based patron access **catalog** client software. All staff PCs also have GUI applications software for acquisitions, serials control, cataloging, or circulation-in some cases two of the modules. All ...server at the public library which is used by all of the libraries, a Web server at the public library which supports the patron access **catalog** of the libraries, a CD-ROM server at the public library which serves only that library and the community college library, a CD-ROM server...

...change in the next year. The libraries are open from 40 to 74 hours per week. Only the Web server which supports the patron access **catalog** is available when the libraries are not open. The libraries are open 11 hours daily Monday through Thursday, 9 hours each on Friday and Saturday... materials supplied by participating book jobbers. The service delivers a cataloging record for any title with a monographic record in WorldCat (the OCLC Online Union **Catalog**), a database of over 30 million records. The book jobber sends a list of titles and the purchasing library's name to OCLC; OCLC then...LC CIP records, are not to be provided.

5. A hard-copy exception report is to be supplied for all titles not cataloged.

6. Always **catalog** monographic series with distinctive titles as books, but with a series added entry.

7. Use only uniform titles established in the LC or OCLC authority

...

...Libraries are increasingly establishing Web sites to provide access to a variety of library and local information, and to provide links to the patron access **catalog** and a variety of other sources of electronic information. Almost all vendors of automated library systems will provide the Web server and the software to access the patron access **catalog**

through the server, but the majority offer no assistance in mounting other resources on the server. In some cases, the Web server software is on...The Library wishes to establish a Web page to inform its patrons about library services and hours, special events, a link to its patron access **catalog** (mounted on a separate server), and links to a variety of electronic information sources on the Web.

General Instructions

1. Responses are due within 30...

...Quote hourly rate for subsequent changes to Web pages.

IX. WEB HOSTING

Many libraries with automated library systems have Web access to their patron access **catalogs**, either on the same hardware platform as ...management of PC printers.

Many libraries do not impose a charge on copies made on screen printers attached to terminals or PCs designated as "express **catalogs**," devices which provide access only to the patron access **catalog**. They do impose a charge when printing from CD-ROM products or from the Internet. Therefore, it is common to outsource only the printers which...Library currently owns and handles the servicing of 17 computer printers attached to PCs used by the public to access the Library's patron access **catalog**, electronic publications on CD-ROM, and the Internet. Four of the printers are Hewlett-Packard LaserJet 5 models, one is a Hewlett-Packard LaserJet 4...and managing a complex automated system--the combined operation becomes substantially more complex than the automated library system which supports a library's patron access **catalog**.

SERVICES

The online reference service is responsible for obtaining licenses to indexes, abstracts, and full-text or image files of journals and reference publications, and...specify emulation required)

c. PCs using Z39.50 client or Z39.50 multi-user client in local library system

d. The GUI-based patron access **catalog** software of the libraries'

automated library systems (vendor to indicate with which vendors' systems it interfaces).

14. Access shall be available at least 20 hours...the vendor monthly. This would include income from appropriations or earnings (usually reflected in bank statements) and cash from fines and services; also copies of **purchase orders**, copies of checking account statements,

and copies of checks.

The vendor produces a monthly financial statement which itemizes the status of each account, including encumbrances... Vendor will be provided documents on a monthly basis, including bank

statements, register tapes for cash income from fines and fees for service,

copies of **purchase orders**

, copies of invoices, and copies of checks.

2. The primary emphasis is on accounts payable as there are only limited receivables.

3. Vendor is to...

...are also

included (see associated RFP for payroll services).

XV. PAYROLL PREPARATION

The most widely outsourced activity in American business is payroll preparation, including associated **tax** filings. Over three million organizations and businesses with as few as one and as many as 8,000 employees do so.

REASONS FOR OUTSOURCING

Calculating...

...telephone, or fax.

In addition to processing and printing the checks; the vendor calculates, deposits, and files state and Federal payroll (Federal 941) and unemployment **taxes** (Federal 940); prepares year-end W-2s and W-3s; and handles all employee payroll inquiries. Management reports typically include a payroll register, a payroll **tax** summary, and other reports sought by the library.

A payroll service normally assumes responsibility for its errors, including the payment of penalties imposed by government...

...cost-effective.

A payroll service has two advantages over a library's own staff: the availability of specialized payroll computers and expertise in the changing **laws** on personnel and payroll **tax** requirements.

VENDORS

While there are national payroll services, most of them pursue large accounts. Among the vendors which have a separate division which focuses on

...

...a number vendors on the Internet.

COSTS

The basic service charges include a base account fee and service charges of \$.80 to \$2 per check. **Tax** filings are from \$4 to \$9 per employee per filing. Direct deposit typically costs \$5 or more per check.

There usually are fees for adding...of \$33,000 includes payment to 12 regular full-time personnel and 11 part-time hourly workers. Three of the employees are subject to city **taxes**. Four of the employees live in an adjacent state. The Library would like to outsource payroll preparation, including check preparation and preparation of W-2 and W-3 forms. The preparation and filing of related **tax** returns and required deposits are also included.

General Instructions

1. Responses are due within 30 days of the issue date in the cover letter.

2...

...end of the monthly pay period by fax or electronic mail. Vendor to indicate which it prefers.

2. Vendor is to calculate the payroll and **tax** for each employee.

3. Paychecks are to be printed and delivered to each of the library's four

locations within 48 hours of submission of...

...make city deposits for four employees.

8. Vendor is to prepare and make workmen's compensation deposits.

9. Vendor is authorized to debit all payroll **taxes** against the bank account number it will be supplied one day prior to the check date.

10. Vendor is to prepare and submit all filings...

...summary is to be submitted within two days of the closing of each month.

12. Vendor is to provide a quarterly report, including a quarterly **tax**

summary, a quarterly taxable wage report, and a statement of deposits.

13. In case of error(s) in a paycheck, a replacement check shall be
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05076978 Supplier Number: 19581028 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Ameritech Library Services.(Vendors of Integrated Library Systems for
Minicomputers and Mainframes: An Industry Report, part 1)

March-April, 1997

Word Count: 8455 Line Count: 00741

...status, normalization of name and subject headings based on Library of Congress or other authorities, conversion of romanized records to vernacular scripts, creation of union **catalogs**, training of library staff for in-house conversions, and production of barcode and spine labels in various formats.

This report will concentrate on Ameritech's...support online terminals appropriate to the particular central processor in use at a given site. In addition, Dynix offers various terminals for specific purposes.

For **catalog** searches, Dynix OPAC terminals are available as conventional terminals or as microcomputer-based retrieval stations. They feature labeled, color-coded function keys that initiate basic...

...as printers for hardcopy output.

As an alternative to conventional computer-to-terminal interaction, Dynix offers client/server components for its cataloging and public access **catalog** modules. These components operate on IBM-compatible microcomputers equipped with Windows 3.x or Windows 95. The Windows-based cataloging module requires 32 megabytes of...

...operating system on IBM-compatible microcomputers equipped with 80486 or higher microprocessors and 16 megabytes of random-access memory. Versions of the online public access **catalog** module are available for Microsoft Windows, Windows 95, Windows NT, and the Macintosh OS. Memory requirements for those versions vary; the Windows version can run...

...and Horizon were designed, from their inceptions, as integrated library systems. A fully configured Dynix implementation includes application modules for cataloging and authority control, public **catalog** access, circulation control, acquisitions, serials, reserve room capability, media booking, information and referral, homebound access, and journal citations, plus electronic mail and report generation capabilities. Horizon, a newer product, supports a narrower range of application components. It provides modules for cataloging and authority control, public **catalog** access, circulation control, acquisitions, serials control, reserve room capability, and media booking.

The Dynix and Horizon cataloging modules support the creation, editing, and maintenance of bibliographic and authority records. As with

other integrated library systems, a Dynix or Horizon bibliographic data base contains one record for each **catalog** entry. Bibliographic records are linked to holdings records that contain information about individual copies. Holdings records include various acquisitions and circulation data, including loan period...Lasercat, and other cataloging sources. As records are imported, Horizon checks them for errors. If none are detected, the imported records enter the library's **catalog**. Other records are transferred to a file for review. The Dynix system can update a library's **catalog** in real-time or batch mode.

Dynix and Horizon each provide authority control capabilities. The Dynix system's authority control features are discussed by Hayes...

...base. The Diogenes service can support ongoing cataloging operations as well as special activities, such as retrospective conversion or reclassification projects.

The Dynix public access **catalog** module makes extensive and effective use of menus and prompts to guide uninstructed searchers through retrieval operations. For experienced users, a shortcut mode employs commands to bypass menus. In consortia or multibranch installations, **catalog** searches can be restricted to items owned by the library in which a given public access terminal is installed, items owned by designated libraries, or...

...command will execute the most recently entered search command on system-wide holdings, eliminating the need to retype the retrieval strategy.

The Dynix public access **catalog** supports a convenient and powerful repertoire of retrieval capabilities. Any field in bibliographic records can be indexed for retrieval purposes. For public access, the most

...list of all indexed words beginning with the specified character string.

Left-truncation of terms can be used to limit searches. If a retrieval specification **includes** multiple search **terms**, a Boolean AND operation is assumed. To initiate a Boolean OR operation, multiple search terms can be enclosed in parentheses, but it is unlikely that...

...author, subject, and series. A search tracking option generates information about the number and types of searches performed in a given Dynix installation.

If a **catalog** search retrieves a single bibliographic record, it is displayed in the full entry format with clearly labeled fields. Where multiple records are retrieved, they are...by the system. In the default format, a saved bibliography includes the title, author, and call number

for all or specified records retrieved by a **catalog** search. Libraries can specify additional fields to be included. Records can be added to a previously saved bibliography.

Dynix PAC for Windows is a microcomputer-based client/server product that adds a graphical user interface to the Dynix public **catalog** access module. It also permits simultaneous searching of a Dynix **catalog** and external Z39.50-compatible **catalogs** or other data bases. Imaging and multimedia files, including universal resource locators for World Wide Web sites, can be linked to **catalog** records. Libraries can create icons to represent CD-ROM information products and software applications, such as word processing or spreadsheet programs, for access by OPAC users. As an alternative graphical user interface for Dynix and Dynix Scholar installations, Ameritech Library Services offers the Kid's **Catalog**, which was developed by CARM Corporation. Kid's **Catalog** is described elsewhere in this issue.

The Horizon public access **catalog** module can operate on IBM-compatible and Macintosh microcomputers. The module provides a graphical user interface, supplemented by keyboard shortcuts for experienced users. Retrieval capabilities...

...linked by Boolean AND, OR, and NOT operators, with or without parentheses. A list of previously entered search statements can be displayed for operator selection. **Catalog** searches can be restricted by item type, location, or other criteria. Search results can be narrowed by a publication date or other data values. Limiting...

...printing or export to other programs. Records can also be transmitted between staff workstations. Like the Dynix PAC for Windows program, the Horizon public access **catalog** module can search external library **catalogs** and data bases that conform to the Z39.50 standard.

Like competing vendors, Ameritech Library Services provides Internet interfaces for **catalog** access or other purposes. For Dynix, Horizon, or NOTIS LIMS installations, the WebPAC program provides access to a library's **catalog** by microcomputers equipped with popular browser programs, such as Netscape Navigator and Microsoft Explorer. It also supports character-based terminals with text-oriented browsers. Ameritech

...services from Dynix installations, including those equipped with conventional terminals.

Since its introduction, the Dynix system has steadily expanded the scope of its public access **catalog** module by incorporating additional information resources. The American Heritage Dictionary, for example, is available to OPAC users. A library can create reading lists or lists...

...online access to the contents of periodicals and scholarly journals using the same terminals, search commands, and retrieval capabilities

employed by the Dynix public access **catalog**. It can load bibliographic data bases produced by various publishers and information providers, including EBSCO, Gale Research, H. W. Wilson Company, Information Access Company, SIRS...

...load particular data bases into a library's Dynix installation.

Journal

citations are maintained in a file that is separate from the library's online **catalog**. Citations from library-owned journals are identified by a special symbol and automatically linked to the library's holdings information, including location and circulation status...college registrar's office on magnetic tape. Authorized staff members can retrieve

borrower records by barcode number, borrower identification number, or borrower surname. Public access **catalog** users can retrieve their own borrower records by entering a barcode number and telephone number. Borrowers can review the items they have in circulation, items...

...control module. A convenient batch reservation capability is provided for repeat requests. The media scheduling module can generate a variety of printed products, including media **catalogs**, reservation work slips and schedules, item schedules, media activity reports, usage counts and summaries, overdue reports, and equipment service schedules. With the Horizon advance booking module, library users or staff members can make reservations for items through the public access **catalog**. A graphical display indicates the availability of desired items for particular blocks of time and simplifies the entry for desired ... expenditures, encumbrances, and balances; lists of encumbrances by title, fund or vendor; vendor performance reports; and item status reports.

The

Dynix acquisitions module can generate **purchase orders** in the BISAC or ANSI X12 formats for electronic transmission. BISAC interfaces are available for a number of vendors, including Baker & Taylor, B. H. Blackwell...

...and bindery orders, The two modules maintain up-to-date holdings summaries for all serial titles and issues. This information is updated in the online **catalog** as issues are checked in. Procurement worksteps are similar to those encountered in the Dynix and Horizon acquisitions modules. Predictive algorithms can accommodate a variety...dominate Dynix installations, academic and special libraries each account for 47 percent of Horizon's customer list. The special libraries component includes corporations, government agencies, **law** firms, medical facilities, scientific research institutes, and professional organizations. As previously noted, Horizon was initially marketed to special libraries. Some of the academic libraries on...

...the Florida State University System (uis.nerdc.ufl.edu), Johns Hopkins

University (janusgate.mse.jhu.edu), Michigan State University (ibmgate.msu.edu), and Princeton University (catalog.princeton.edu).

Academic libraries have dominated the NOTIS customer list since the system's inception as a commercially available product. More than 80 percent of...inventorying.

The Dynix system supports a broader range of application modules than some competing products. In addition to the familiar combination of cataloging, public access catalog, circulation control, acquisitions, and serials, a fully configured Dynix implementation can incorporate . reserve room capability, media booking, information and referral, homebound access, journal citation data...

...terminal, and function level prevent unauthorized access. Where a graphical user interface is desired, Dynix offers optional Windows-based software for cataloging and public access catalog. As a client/server product, Horizon incorporates graphical user interfaces into all of its application modules. Horizon's OPAC module can operate on IBM-compatible...

...systems with new hardware or software supplied by Ameritech, others will solicit competitive proposals. Many public and state-supported academic libraries are bound by procurement regulations that mandate competitive bidding for system replacement. The small-to-medium-size public and academic library market, the segment historically dominated by Dynix, is served...

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04833457 **Supplier Number:** 19761240 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Vendors of integrated library systems for minicomputers and mainframes: an industry report, part 2(part 2: Geac Computers Inc., Innovative Interfaces Inc., VTLS Inc. and bibliographic references)(Company Profile)

May-June , 1997

Word Count: 26345 **Line Count:** 02250

...in each purchase order. Order dates and other default information are automatically supplied by the system. As an alternative to production and mailing of printed purchase orders, ADVANCE supports electronic data interchange in the BISAC format. Libraries can define BISAC

vendors, create and transmit electronic orders, and receive confirmations.
The BISAC interface...

...Unix asynchronous communication protocols. ADVANCE supports the X12 protocol for serials invoices.

The bibliographic portion of order records can be added to the public access **catalog** when entered or routed to cataloging workfiles. As previously noted, records for items on order can be accessed through the OPAC. Funds are encumbered or...

...local mounting and online access to periodical indexes and other reference data bases, using terminals and retrieval procedures supported by each system's public access **catalog** module. Geac has data base licensing agreements with various vendors, including EBSCO, H. W. Wilson Company, Information Access Company, and UMI. Reference data bases are...

...can load data bases that are in the MARC format.

The Z39.50 Intersystem Link gives ADVANCE and PLUS OPAC users access to other library **catalogs** and external data bases. It can also interconnect an ADVANCE and PLUS system, allowing a **catalog** on one system to be searched using retrieval commands and procedures of the other.

INSTALLATIONS

As discussed above, Geac's second-generation, Unix-based ADVANCE... others. Both systems provide consistent commands and display formats across all application modules. Both systems offer cataloging with authority control, interfaces to bibliographic utilities, flexible **catalog** access capabilities, versatile circulation control features, and local mounting of reference data bases. Some components -- such as the client/server GeoCat and GEOPAC workstations, the...client/server products with leading-edge capabilities. At the time of this writing, Geac offered the GeoCat and GeoPAC client/server components for cataloging and **catalog** access only. These components are implemented as optional add-ons in ADVANCE and PLUS installations. As described above, they provide graphical user interfaces, which Geac...

...In the mid-1980s, Innovative Interfaces broadened its product line with the introduction of INNOPAC, a fully integrated library automation system that supports cataloging, online **catalog** access, circulation control, acquisitions, serials control, and other components. Ballard (1995) describes INNOPAC's capabilities. In 1996, Innovative Interfaces announced Project Millennium, which will develop...

...less costly alternatives to the elaborately configured Windows-based microcomputers required by other client/server products. A Web-based implementation of the INNOPAC public access **catalog** is currently available. (As discussed below, INNOPAC supports client/server components for other application modules, but they run on conventional Windows-based microcomputers rather than...the NISO Z39.47 standard, "Extended Latin Alphabet Coded Character Set for Bibliographic Use." Innovative Interfaces also offers CJK capabilities for libraries that want to **catalog** Chinese, Japanese, and Korean works in vernacular scripts. Implementation of that capability involves the addition of CJK software to the INNOPAC cataloging module. CJK cataloging...

...devices. INNOPAC supports Ada-compliant workstations.

SYSTEM DESCRIPTION

Like other integrated library systems, INNOPAC is modular in design. Application subsystems are available for cataloging, public **catalog** access, circulation control, acquisitions, serials control, reserve room management, materials booking, interlibrary loan, inventory management, and electronic mail.

As an integrated system, INNOPAC employs a...

...data base using INNOPAC search commands. The retrieved records can be

downloaded to an INNOPAC system for local editing and loading.

INNOPAC's public access **catalog** module is menu-driven. Interfaces are currently available for eight languages: English, Chinese, French, Gaelic, Polish, Spanish, Thai, and Welsh. The non-English interfaces were...

...OPAC is accessible from any INNOPAC terminal. Straight-forward in presentation, it is well suited to novice users, who should be able to satisfy their **catalog** access requirements with little or no instruction. An introductory screen lists available retrieval options for operator selection. Subsequent screens provide instructions pertinent to specific types of **catalog** searches, together with examples that illustrate search procedures. A subject search screen, for instance, includes examples of single-term and multi-word subject headings. A library can specify the content of instructions and examples to be included in particular screens.

Within each OPAC screen...some other integrated systems, a command-driven "expert" mode is not provided, but INNOPAC's highly usable repertoire of search commands should successfully accommodate most **catalog** access requirements. Bibliographic records can be retrieved

by author, title, subject headings, or keywords in any field. Subject terms

are automatically searched within all heading subdivisions.

Cross-references are fully integrated within the online **catalog**; INNOPAC will automatically substitute the approved term for an invalid heading when a "see" reference is encountered. As a convenient feature, a

title or subject...

...supported for root-word searching. INNOPAC automatically searches for

variant spellings of search terms; thus, a keyword search for the term "labor" will also retrieve **catalog** records that contain the variant form "labour." Boolean operations are supported for title and keyword searches. The Boolean AND operator is implicit for multi-keyword...

...parameters of the type described above. Holdings information and circulation status are displayed in multiple windows for all copies of a retrieved item.

Among other **catalog** display options, a MARC-format display includes tags, indicators, subfield codes, and encoded diacritics. It also includes data, such as Library of Congress Card Numbers...

...of limited interest to most users. A display format for library staff includes additional acquisitions-related information. A library can suppress the display of any **catalog** record in order, for example, to omit personal copies of books on reserve or professional books and journals acquired for staff use only. The INNOPAC...

...different formats, including Pro-Cite and End-Note.

In addition to its original character-based interface, INNOPAC supports several client/server products for online public **catalog** access. The INNOPAC WindowPAC program runs on Windows-based and Macintosh microcomputers. It features pull-down menus, point-and-click navigation, multi-window displays, and...

...also supports hypertext links to other titles by the same author or about the same subject. Like some competing products, INNOPAC supports the Kid's **Catalog** from CARL Corporation. A microcomputer-based product, its graphical user interface is optimized for younger users.

The INNOPAC Web Server permits OPAC searches by microcomputers...

...and other materials to bibliographic records. Although Innovative Interfaces does not offer a separate community information or information

and referral module, an INNOPAC public access **catalog** can incorporate screens that contain bulletin board-type information.

INNOPAC

software has also been used to create and manage data bases of community

information, library...out function, brief bibliographic records can be

entered for items not in the library's data base. Circulation transactions are automatically blocked when exceptional borrower **conditions** are encountered. Examples **include** an excessive number of items charged out, an excessive number of items overdue, or an excessive amount of fines owed. Threshold values for such exceptions...

...that all parts of an item are present. An authorized operator can backdate check-in transactions. For recently returned items, the circulation status field within **catalog** records can contain a special message for a specified period of time to allow for reshelfing. To maintain the privacy of borrowers, charge-out records...

...be charged out at any circulation terminal, and reserve and nonreserve items can be intermingled in a given circulation transaction. Through the online public access **catalog** module, course records can be retrieved by course identifier, instructor, or other library-specified fields. Reserve status is indicated in **catalog** records. The INNOPAC system can print reserve lists by course or instructor. As discussed below, Innovative Interfaces also offers an electronic reserves capability that links...

...OPAC users can also book course reserve items. The INNOPAC interlibrary loan module was introduced in 1996. It allows OPAC users to search other library **catalogs** or external data bases and initiate interlibrary loan requests, which are then submitted to library staff members for verification and processing. Request forms for various...from book jobbers or other vendors for items to be shipped on approval. On entry, INNOPAC will check for duplicate items in the library's **catalog** and on-order file. INNOPAC performs currency conversions at the time an order is placed and when it is paid.

INNOPAC prints **purchase orders** on three-by-five-inch slips intended for insertion into a window envelope. **Purchase orders** are printed in duplicate; one of the copies is to be returned with the item. Receiving procedures are straightforward. The library key-enters order numbers...

...processed against order records. Unless a problem is encountered, there is no need to view order records for received items. As an alternative to printed **purchase orders**, INNOPAC can transmit orders to vendors electronically in the BISAC format through INNONET, a subnet of the TYMNET network. INNOPAC can also receive invoices and...

...monitors items for arrival within library-specified time periods and will issue claims accordingly. In addition, claims can be initiated manually at any time. Like **purchase orders**, claiming notices

are printed in duplicate on three-by-five-inch slips for insertion into window envelopes. The vendor can return one copy as a...

...to be bound. It can also print binding slips and track issues that have been sent to the bindery, noting that status in the online **catalog**. Summary holdings statements are automatically updated when issues are returned from the bindery.

To simplify the management of serial subscriptions, Innovative Interfaces offers Innopac/subscribe...for 12 percent of INNOPAC installations, while school libraries account for just 1 percent. Special libraries—including government libraries, corporate libraries, hospital libraries, and county law libraries—account for 6 percent of the installed base, but INNOPAC's academic library installations include many law school and medical school libraries that might be categorized as special libraries. Since the mid-1980s, Innovative Interfaces has enjoyed particularly strong sales to law school libraries, a market niche that it dominates. The INNOPAC customer list includes many large libraries. Its largest installation, the OhioLINK consortium, involves over 15...

...California Institute of Technology (ibopac.caltech.edu), Center for Research Libraries (crlcatalog.uchicago.edu), Chinese University of Hong Kong (library.cuhk.edu.hk), Columbia University Law Library (pegasus.law.columbia.edu), Frick Art Reference Library (fresco.frick.org), Getty Research Institute for the History of Art and the Humanities (opac.pub.getty.edu), King...is based largely on the excellent, proven functionality of its application components. A typical INNOPAC implementation supports the familiar quintet of application modules: cataloging, public **catalog** access, circulation control, acquisitions, and serials control. Intelligently conceived and attractively implemented, these application modules provide an effective repertoire of basic capabilities and special features...

...very flexible. The INNOPAC acquisitions and serials control modules are exceptionally good. With other systems, those components have historically received less developmental attention than public **catalog** access and circulation control. While some vendors have recently improved their acquisitions and serials components, Innovative Interfaces remains the leader in those application areas. The...

...with a number of information publishers. Z39.50 capabilities are supported at both client and server levels. The INNOPAC Gateway component can access other library **catalogs**, Internet resources, and various external data bases.

The most significant future concern for well established vendors of integrated library systems is their continuing ability to...

...this issue, Innovative Interfaces is taking an evolutionary approach to client/server technology. It currently offers Windows-based client/server products for cataloging and public **catalog** access, while the INNOPAC Web Server permits **catalog** access by Web browsers. These products are designed to interact and co-exist with conventional INNOPAC components; they do not replace them. Other integrated system...

...university had examined commercially available library automation systems but rejected them as unacceptable. The customized system, which combined circulation control with an online public access **catalog**, was installed in late 1975. VTLS software became available to other libraries in 1980. Virginia Tech's Center for Library Automation was established in 1983...future directions.

Both the VTLS and Virtua systems are modular in design. The basic VTLS system includes applications subsystems for cataloging, authority control, online public **catalog** access, keyword and Boolean searching, circulation control, reserve room capability, serials control, materials booking, and report production. Of these, only the cataloging component is essential, but most VTLS installations have also implemented the online public access **catalog** and circulation control modules. Additional software components support acquisitions, journal indexing, and document delivery.

In its initial release, Virtua will support cataloging with authority control, online public **catalog** access, and predefined reports as basic system components. Optional modules include circulation, acquisitions, serials control, reserve room capability, a Web interface to the OPAC, and...online browsing of authority files, global editing of authority records, and merging of headings. Cross-references are accessible online and fully integrated with the online **catalog**.

The VTLS public access **catalog** module offers a choice of menu or command-driven interfaces. Both are easy to use, and an operator can alternate between the two interfaces. The menus...

...support menus and mouse operations as well as downloading of search results. The VTLS InfoStation provides a graphical user interface to the VTLS public access **catalog** as well as to external data bases. Icons are used to select data bases to be searched, to download records, and initiate other operations. Among...
...particular subject, for example, then temporarily set aside while a new search is conducted.

The Virtua Web Gateway provides access to a library's online

catalog from any Web browser. It can be implemented on a Virtua server or on a standalone Web server. The Web interface offers the same search...with autonomous branches, libraries can have more than one top level in the hierarchy of accounts.

Acquisitions information can be included in the public access **catalog**. Bibliographic records transferred to the acquisitions and fund accounting component can be assigned a status of "to be ordered." That status is changed to "on order" when a **purchase order** is generated. Canceled and received orders are also noted. Partial receipts are permitted. When receipt information is entered, order records are automatically updated. Workforms are...

...automatically generated for items that have not arrived by an expected date. Subscription orders include an expiration date that is used to generate renewal alerts. **Purchase orders** can be printed or generated electronically. The Virtua acquisitions module supports the X.12 protocol for electronic data interchange. Preformatted acquisitions reports include account summaries...

...or call number screen. Users can display a menu of articles in a given periodical issue or the chapters of a book. The public access **catalog** includes symbols that indicate whether journals and ...for keyword searching.

The VTLS document delivery subsystem facilitates the circulation of materials from closed-stack collections. Requests for items can be entered online during **catalog** searches. The requests are then paged by library staff and brought to designated pickup locations. The subsystem can also be used for online entry of...

...sources, including H. W. Wilson, Information Access Company, and UMI.

The data bases are indexed in the VTLS format for searching through the public access **catalog**. Journal citations in locally mounted data bases can be linked to records in a library's **catalog**, indicating to searchers whether the library owns a particular issue of a journal. This

information is updated automatically when new journal issues are received.

The...They can import machine-readable cataloging records from a variety of sources. Effective original cataloging and authority control capabilities are provided. The VTLS public access **catalog** module offers a choice of menu- and command-driven modes, while Virtua provides an attractive graphical user interface. Novice users can locate desired information quickly, while powerful retrieval capabilities are provided for advanced searchers. Like other vendors, VTLS has introduced a Web interface that

supports **catalog** access from microcomputers equipped with Netscape Navigator or other browser programs. The VTLS and Virtua circulation modules are highly parameterized and very flexible. The accounting...
...United States while further solidifying its strong international market position. While VTLS has augmented its original system with client/server components for cataloging and online **catalog** access, Virtua is a brand new product that is based specifically and exclusively on client/...

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04833456 **Supplier Number:** 19761239 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Vendors of integrated library systems for minicomputers and mainframes: an industry report, part 2.(part 1: Contec Data Systems, Data Research Associates, Endeavor Information Systems, EOS International, Fretwell Downing Informatics)(Company Profile)

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...existing integrated system, allowing that system to be used for specific operations -- such as circulation control or acquisitions -- while using the C2 System for online **catalog** access or other applications. The

C2 System's application programming interface specifications are available to system integrators, software developers, and others.

The C2 System was...

...with the library's collection size and characteristics. The maximum size for a C2 data base is four gigabytes, which is sufficient for a library catalog with four million MARC records. There are no limits on the number of records that can be stored in a data base or the number...

...C2 System supports a variety of barcode readers, printers, and other peripheral devices.

SYSTEM DESCRIPTION

The C2 System includes application modules for cataloging, online public catalog access, circulation control, acquisitions, and serials control. All application components are fully integrated; one data base stores all library information, although a C2 implementation can...

...references can designate related, broader, and narrower terms, as well as preferred, non-preferred, earlier, and later headings. Authority control is fully integrated with online catalog access. Cross-references are displayed during OPAC searches.

The C2 OPAC module provides three levels of catalog access for searchers of varied experience and expertise. The C2 System is multilingual. The OPAC searcher selects the desired language for system prompts, menu selections...frequently within a retrieved record. Data base metrics are maintained dynamically; term weightings are automatically recalculated as new records are added to a library's catalog.

A second-level retrieval mode lets OPAC users specify a field for matching of search terms. Relevance ranking is provided for retrieved records. The C2...

...MARC format for community information.

The C2 circulation control module is fully integrated with the OPAC component. The circulation status of items is displayed when catalog records are retrieved. Circulation transactions are governed by library-specified parameters for borrower and item categories. The borrower data base stores information about authorized borrowers...1990s, such libraries may prefer to skip over popular but aging Unix processors.

The C2 System supports the customary group of application modules: cataloging, online catalog access, circulation control, acquisitions, and serials control. The cataloging module incorporates thesaurus-like authority control as a standard feature. All modules feature graphical user interfaces...

...significantly enhanced version.

In 1978, DRA developed and implemented a fully integrated library

automation system for the Cleveland Public Library. The system which supported cataloging, online **catalog** access, circulation control, acquisitions, and serials management-was subsequently offered to other libraries as A Total Library Automation System (ATLAS). During the 1980s, the names...The following discussion covers the DRA Classic and MultiLIS product lines.

A fully configured DRA Classic installation includes application modules for cataloging, authority control, public **catalog** access, circulation control, acquisitions, serials control, reserve room, media booking, journal citations, information and referral, report generation, and full-text retrieval. MultiLIS application modules include cataloging and authority control, public **catalog** access, circulation control, acquisitions, and serials control.

As fully integrated systems, all DRA products employ a single data base that combines bibliographic records, authority records...

...in a networked configuration. With both DRA Classic and MultiLIS, security features prevent unauthorized access to specific system capabilities. With the exception of the public **catalog** component, access is controlled by user numbers and passwords. Specific terminals can also be assigned to designated functions, such as cataloging or circulation control.

The...records, any of which can be utilized by a participating library as its accepted form. An authority file is displayable as an online thesaurus that **includes** related **terms**, broader **terms**, narrower terms, and scope notes for individual entries. Global editing capabilities facilitate maintenance of authority records. In addition to checking headings against authorized forms, the...

...s records against several authority files, including the Library of Congress authority data base and LC children's subject headings.

DRA Classic's public access **catalog** module supports menu- and command-driven retrieval modes, index browsing, and keyword searches of library-designated fields within MARC records. Any field can be indexed...

...language, type of material, and library location. In consortium installations, OPAC displays can be limited to a specific library's materials.

The MultiLIS public access **catalog** module is menu-driven. It relies on defined function keys to initiate search operations and includes help screens with examples. A command-driven search mode...

...publisher, country of publication, library location, and format. Root-word searching and Boolean operators are supported. Authority control is fully integrated with the public access **catalog**. Cross-references

are displayed for user selection without rekeying. Users can request an explanatory display of authority information for specific headings. The explanation includes ...

...library's holdings and subsequently broaden to include all bibliographic records. In consortium installations, individual libraries can specify the types of permissible searches. Public access **catalog** displays can be limited to the holdings of specific libraries in a consortium installation. Individual libraries can specify brief or full formats for record displays

...

...support the MARC format for holdings information.

Like other vendors, DRA has expanded its offerings to include several client/server products designed specifically for online **catalog** access and other data base searching. DRA was one of the first library automation vendors to support the Z39.50 standard. It currently offers Z39

...

...stations, DRA's Information Gateway component provides a Windows-like interface with pull-down menus.

DRA Kids provides a graphical user interface to DRA online **catalogs** and Z39.50-compliant data bases. As described by Matthews (1996a), it provides alphabetical icons that simplify subject searches by minimizing typing requirements. It can...

...predetermined topics that can be customized by the library. A map indicates the library location of retrieved items.

DRA Web provides access to DRA online **catalogs** and Z39.50-compatible data bases by microcomputers equipped with popular Web browsers, such as Netscape Navigator or Microsoft Internet Explorer. DRA Web is included...interchange between libraries and book and serial vendors. A microcomputer-based component based on electronic data interchange programs from St. Paul Software, it can transmit **purchase orders**, acknowledgments, and invoices. The DRA Classic acquisitions module, which operates on an Alpha or VAX processor, sends order and invoice information to a microcomputer equipped...and Pearce (1988). INLEX sites that are accessible via the Internet include Kansas City Public Library (motto.kckpl.lib.ks.us) and Montana State University (**catalog.lib.montana.edu**).

COMPETITIVE ANALYSIS

Data Research Associates has been a leading supplier of integrated library systems since the introduction of that product group. Its...

...a broader range of optional components than the other DRA product lines

and some competing systems. In addition to the familiar quintet of cataloging, public **catalog** access, circulation control, acquisitions, and serials control, it offers materials booking, information and referral, full-text retrieval, document imaging, and newspaper indexing.

 Data Research Associates...Sun SPARC processors, as Voyager servers.

 SYSTEM DESCRIPTION
 Voyager is a fully integrated library system with application modules for cataloging and authority control, online public **catalog** access, circulation control, acquisitions, and serials control.

 Voyager supports MARC formats for bibliographic, authority, and holdings information. Libraries can use an online tag table to...

...OPAC displays.

 Voyager's graphical user interface relies on icons and pull-down menus to simplify OPAC searches. The initial OPAC screen includes a local **catalog** icon that initiates a search of the library's own data base. Depending on the implementation, additional icons may provide access to other library **catalogs**; locally mounted or remote data bases; other computer applications, such as Web browsers or electronic mail; information about the library's hours and events; and...example, Voyager launches a library-specified Web browser and accesses the designated page.

 As noted above, a Voyager implementation can provide access to other

library **catalogs**, data bases offered by online information services, CD-ROM information products, Web sites, or other remote data sources. When

the appropriate icon is selected, a...

...are performed in real-time. Circulation status information is contained

in OPAC records and automatically updated as circulation transactions occur. Voyager supports eleven different status **conditions**, including "charged," "not checked out," "missing," And "in transit." Transactions blocks for excessive overdue items, unpaid fines, claimed returns, or other exceptional conditions can be defined...integrated with

other Voyager application modules. Order preparation is simplified by linking bibliographic records to order records. On-order status is indicated in OPAC displays. **Purchase orders** can be printed or generated electronically. Voyager supports the UN/ EDIFACT standard for electronic data interchange.

 Fund names and categories are defined in a hierarchical...

...is performed automatically. Libraries define procedures for closing or rolling over fund allocations and balances at the end of a fiscal year. In addition to **purchase orders**, the acquisitions module can print claim letters, vouchers, checks, cancellation notices, and a variety of lists and statistical reports.

 The Voyager acquisitions module is used...

...or other identifiers. Check-in records can be based on data transferred from the acquisitions module or from bibliographic information retrieved from a library's **catalog**. As with other Voyager modules, multiple windows and graphical user interface components facilitate the completion of check-in, claiming, and related tasks for specific issues...

...particularly good market acceptance among museum libraries. The remaining Voyager installations are in public libraries. Endeavor has no school library installations.

A number of Voyager **catalogs** are accessible via the Internet. Examples, with telnet addresses, include the American Museum of Natural History (nimidi.amnh. ...Voyager installations. The client software will merge search results and resolve duplicates. Such broadcast search capabilities will be extended to other Z39.50-compliant library **catalogs**, as well as locally mounted data bases and external information services. Endeavor has also announced plans for cross-institutional borrowing arrangements, including intra-system loans...

Cibbarelli (1993a), Henderson (1991), Herhodt et al. (1987), Matthews (1991), Matthews and Parker (1993), and Noerr (1986). A special version called TINLAW was developed for law libraries. TINLIB was built upon a data base management system called TINMAN, which was designed specifically to accommodate bibliographic data and textual information. TINMAN's...companies.

SYSTEM DESCRIPTION

The T Series and Q Series are modular integrated library systems. The T Series supports application modules for cataloging, authority control, online **catalog** access, circulation control, acquisitions, serials control, and interlibrary loan. Q Series modules include cataloging and authority control, online **catalog** access, circulation control, acquisitions, serials control, and a report generator. The T Series and Q Series provide flexible data base management capabilities. Variable-length, repeating...

...Series modules provide graphical user interfaces. The T Series is a character-based product, although an optional graphical user interface component is available for online **catalog** access.

The T Series cataloging module relies on formatted screens to facilitate key-entry of original cataloging data. The screens are based on predefined templates...

...is provided. Cataloging records can be copied, then edited to create new records. Analytical cataloging is supported. The MARC 856 tag can be used to **catalog** multimedia resources, Web pages, or other electronic

records. MARC and NON-MARC records can be imported from various sources,
including bibliographic utilities, national libraries, and...

...entered or imported from machine-readable sources. A list of authorized headings can be displayed or printed on demand. Libraries can define cross-reference relationships, including broader **terms**, narrower **terms**, related terms, earlier forms, and later forms for authority-controlled headings. When information is entered in an authority-controlled field, the system validates the entry...
...and circular references. Global editing of authority records is supported. Statistical reports indicate the number of items added to or deleted from a library's **catalog** during a specified time period; the number of occurrences for specific cataloging transactions; and the number of items cataloged by type of material.

The T...incorporate images, tables of contents, and other information into bibliographic records; bulletin board displays for library or community events; and links between a library's **catalog** and document images, full-text documents, Internet sites, HTML files, CD-ROM data bases, or other information resources. The TWIN program also supports borrower-initiated...

...information to determine items on loan or fines owed. EOS International's WorldPAC is a standalone component that provides Internet access to a library's **catalog** by microcomputers equipped with popular browser software. NetPAC, another standalone component, is a Z39.50 client program that provides Internet access to compliant data bases.

The Q Series OPAC module provides a consistent graphical user interface for searching a library's **catalog** and external data bases. OPAC clients are limited to inquiry-mode operations; they cannot enter or edit bibliographic records. **Catalog** records can be retrieved by author, title, or subject, author/title, added entries, publisher, publication date, ISBN or ISSN, series title, or other fields. Keyword...
...available.

The T Series and Q Series circulation control modules are fully integrated with their OPAC counterparts. The circulation status of items is displayed when **catalog** records are retrieved. Circulation transactions are governed by library-specified parameters for borrower and item categories. Libraries can specify loan and renewal periods, fine rates
...for copyright compliance. The T Series and Q Series incorporate report generator modules that allow libraries to develop customized circulation reports as well as bibliographies, **catalogs**, and other printed output.

The T Series and Q Series acquisitions and serials control modules are fully integrated with other program components and with each...

...order records is facilitated by acquisitions templates. The templates combine author, title, imprint, ISBN, and other bibliographic information with such order-specific data elements as **purchase order** number, type of order, requester, supplier code, number of copies, price, invoice address, and handling instructions. Templates permit single-item and multi-item orders. Bibliographic information can also be transferred into order records from a library's **catalog** or downloaded from external sources, such as bibliographic utilities or CD-ROM cataloging support products. The Q Series can load vendor-supplied diskettes that contain MARC records for approval plan materials. Order records can be retrieved by title, **purchase order** number, vendor, or requester, among other parameters. Desiderata files can store order records for review and approval.

The T Series acquisitions module supports two levels...

...given and received. Currency conversions are based on values stored in tables. A warning is issued when fund balances fall below a library-specified level. **Purchase orders** can be printed individually or in batches. The latter can be sorted by **purchase order** number or by vendor. Vendor records contain name and address information, the name of a contact person, and discount information. The T Series and Q...formatting capabilities. Page headings, margins, indentations, field positions, and other attributes can be tailored to specific application requirements. Bibliographic records can be printed in a **catalog** card format. Tabulations can be based on arithmetic functions, averages, and percentages. Output can be exported to spreadsheet programs for further processing.

INSTALLATIONS

The Q...using the Oracle Relational Data Base Management System, which is also employed by other integrated library systems. Application subsystems are provided for cataloging, online public **catalog** access, circulation control, acquisitions, serials control, interlibrary loan, and report production.

An OLIB system can import machine-readable cataloging records from various sources, including magnetic...
...pages. MARC tags can be substituted for field names. Any data entry screen can be placed in the query mode to search a library's **catalog** for previously entered records.

The OLIB system automatically validates ISBNs for uniqueness, length,

and check digits. Authority control is supported for many fields, including names...

...cataloging records for events, groups, or persons, as well as companies, government agencies, or other organizations. Although OLIB does not have a reserve room module, **catalog** records can be created for reading lists that contain titles, course names, and instructors' names. Items in such lists can be linked to bibliographic records...

...feature graphical user interfaces. All three approaches can be intermingled in a given OLIB implementation.

All three OPAC modules are based on research into online **catalogs** performed by the OKAPI projects at City University in London. That research, which addresses problems that users face ...user can resume an interrupted OPAC session at the point of termination. When users select text files, images, or other objects that are linked to **catalog** records, OLIB WorldView OPAC will automatically launch the program required to view the associated object. Links can also be defined for Web pages or other...languages. Circulation status information is included in OPAC displays.

The OLIB system has separate but interlinked components for acquisitions and fund management. The library's **catalog** or an external Z39.50-compliant data base can be used for pre-order searching; retrieved records can be used for order preparation. Vendors can...

...the same system or between an OLIB library and other libraries. An operator enters information about the item and requester, searches the library's online **catalog** or a Z39.50-compliant data base, and initiates the request. Retrieved records can be transferred directly into an interlibrary loan request form, which also...

...system built upon the widely implemented Oracle Relational Data Base Management System. OLIB supports the customary range of application modules: cataloging with authority control, online **catalog** access, circulation control, acquisitions, and serials control, plus interlibrary loan. Materials booking, reserve room capabilities, and other optional modules supported by some competing products are...

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04081862 **Supplier Number:** 15843422 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Integrated library systems for microcomputers and mainframes: a vendor study.
(part 2)

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...the creation, editing, and maintenance of bibliographic and authority records. As with other integrated systems, Best-Seller's bibliographic database contains one record for each **catalog** entry. Bibliographic records are linked to holdings records that contain information about individual copies. Best-Seller automatically creates a separate holdings record for each copy...OCLC, Utlas, and BiblioFile. Additional interfaces can be developed to satisfy special customer requirements. Best-Seller also offers optional software that allows a library's **catalog** to function as a resource for other libraries that access it online or through batch requests. A Best-Seller system can export bibliographic records in...

...thus eliminating the need to create separate authority records for each variation.

The Best-Seller OPAC module provides read-only access to a library's **catalog**. It is designed for maximum flexibility in configuration and operation. Libraries can define the fields to be indexed for **catalog** searches as well as the content and format of all OPAC screens. Best-Seller software imposes no limit on the number of fields that can...fully integrated with other Best-Seller application modules. When an order is created, the system transfers bibliographic data from the order record into a partial **catalog** record. When a title or ISBN is entered, Best-Seller automatically searches the library's **catalog** for duplicate records. Records can be transferred from the cataloging module to simplify the preparation of orders for previously purchased items. On-order status is...

...account codes, the original account allocation, total expenditures and encumbrances, and the current account balance. The system performs currency conversions and automatically calculates applicable sales **tax**. Best-Seller maintains files for publishers and suppliers. Each record includes the publisher or supplier's name, identifying code, address, telephone number, fax number, language of communication, and contact person.

Purchase orders can be printed individually or in batches. Libraries can define the contents of **purchase order**

forms. As many as five claiming notices for unreceived items can be issued at specified intervals. Best-Seller is currently developing electronic interchange capabilities for...

...titles under which the periodical was published; a subject code; and holdings information. Data in serial records can be key-entered or derived from existing **catalog** records. Multiple subscription records can be created for each title. Each subscription record includes an order number, order type, supplier code, publication frequency, enumeration patterns... component or through the OPAC module. Indexes to reference databases are library-definable. They can be the same as, or different from, indexes for online **catalog** searching.

Best-Seller can provide gateway access, via appropriate telecommunication facilities, to external computer systems. Z39.50 capabilities are in development.

INSTALLATIONS

Best-Seller is...

...over bibliographic record formats, data entry screens, authority control, record displays, circulation policies, and other aspects of system implementation and operation. Its online public access **catalog** offers versatile retrieval capabilities but is easy to use. An expert mode is provided for experienced users and library staff members. Best-Seller's circulation control, acquisitions, and serials control components are fully integrated with a library's bibliographic records and online **catalog**. A good report generator supplements the system's preconfigured reports and notices.

Best-Seller is one of several integrated library systems owned by companies with...two systems likewise share attractive, fully integrated designs with excellent functionality. Both systems feature well-designed application modules that support cataloging with authority control, online **catalog** access, circulation control, and acquisitions. While the multiLIS system provides more extensive facilities for consortium-type installations, the commercial availability of a serials control module...

...is self-funding and has no debt beyond its operating lines of credit.

In addition to the CARL system, CARL Corporation offers the Kid's **Catalog**, a graphical online **catalog** interface designed specifically for children, and UnCover, a journal article indexing and document delivery service. Introduced in 1993, the Kid's **Catalog** is

a client/server product developed by CARL Corporation in cooperation with the Denver Public Library. Versions are available for Macintosh and Windows-based microcomputers. While originally designed for use with the CARL system, the Kid's **Catalog** has been adopted by other integrated system vendors, including Dynix and Sirsi Corporation. Everybody's **Catalog**, a similar graphical online **catalog** interface product for adult users, is scheduled for availability in mid-1994. In 1993, CARL established the UnCover Company, a joint venture with B.H...s offerings will include gateway and Internet access to commercial information services and third-party databases. It will also enable libraries to make their online **catalogs** accessible via the Internet using CARL's search engine.

COMPUTING ENVIRONMENT

The CARL system is a turnkey integrated library system. Based on an analysis of...

...View, an ADA-compliant, microcomputer-based magnifying display station from TeleSensory.

SYSTEM DESCRIPTION

The CARL system supports interrelated application modules for bibliographic maintenance (cataloging), online **catalog** access, circulation control, and serials and acquisitions. The bibliographic maintenance and public access **catalog** modules are required components installed at all customer sites. CARL Corporation also offers imaging capabilities, support for locally installed databases, and online access to reference databases through the CARL system.

As with other integrated systems, CARL's bibliographic database contains one record for each **catalog** entry in a library's collection. Bibliographic records are linked to item records that contain information about individual copies. Such information includes the library location...

...database can represent the collection of one library, the CARL system was developed specifically for multilibrary implementations where the bibliographic database serves as a union **catalog** of participants' holdings. The system can associate hundreds of item records with each bibliographic record.

The CARL system's bibliographic maintenance module permits the addition...

...have been developed. The CARL database structure can accommodate MARC records of unlimited length. A library can also define a format for brief MARC records. **Catalog** records can be key-entered or imported in machine-readable formats from external sources. Key entry relies on

predefined templates for particular MARC formats or...

...record indexing, are performed in real-time rather than by batch processing. Newly entered information is immediately accessible through the system's online public access **catalog** and circulation control modules. As new records enter a CARL database, they are compared to existing records by matching specific field values, such as an...

...will support verification of new headings, global editing of headings, retrieval of LC MARC authority records, and incorporation of cross-references into the public access **catalog**. In multilibrary installations, individual participants will be able to maintain their own authorities, including headings that deviate from source authority records. A lower level of implementation omits local maintenance of LC MARC authority records.

In multilibrary installations, **catalog** searches can apply to all participants or be limited to a single library or group of libraries. CARL's online public access **catalog** module supports name searching, word ...displays the nearest matching entry or help information. When authority control becomes commercially available, cross-references will be displayed for operator selection during public access **catalog** searches.

The initial display of search results is a numbered list of brief records that include the author, title (truncated if necessary), call number, and...

...search based on a selected parameter. Depending on the equipment configuration at users' workstations, search results can be downloaded or printed.

The CARL Kid's **Catalog**, as noted above, is a client/server product that incorporates graphical user interface concepts to simplify searches. Designed specifically for school-age children, it permits point-and-click operations to initiate searches. It compensates for failed searches associated with typing errors, misspellings, inaccurate punctuation, or improper syntax. The Kid's **Catalog** supports browsing of preconstructed subject hierarchies to facilitate selection of search terms. Color displays highlight significant information in retrieved records, while a map indicates...

...literature. The program also provides a browsable list of the most frequently searched names, subjects, and series. A Spanish-language version of the Kid's **Catalog** has been announced. CARL Corporation has also announced Everybody's **Catalog**, a version of the Kid's **Catalog** for adults. Using graphical interface components, it simplifies the entry of search terms, browsing of index entries, and the use of advanced search

capabilities, such...

...online retrieval of borrower records, including information about current fines, overdues, lost books, and holds. At the library's option, borrowers can use public access **catalog** terminals to retrieve their own records in order to determine items charged out and fines owed. CARL

Corporation also offers a call-in capability that...borrower notices printed for lost or withdrawn items. At the library's option, registered, nondelinquent borrowers can place title level holds during a public access **catalog** search.

CARL users can determine the circulation status of any item in any CARL system installation. CARL Corporation is developing a user-driven interlibrary loan...

...files, request-for-quote records, and files of records for consideration by staff members outside of the acquisitions department. Order records can be retrieved by **purchase order** number and order date, as well as by bibliographic parameters. At the library's option, order records can be incorporated into the public access **catalog** at the time they are created. If desired, specific order records can be withheld or withdrawn from the public access **catalog** while remaining active in acquisitions files.

The SRAQ module also maintains vendor and fund files. Formatted screens and operator prompts simplify data entry for both...

...identifier; amounts budgeted, encumbered, and expended; the uncommitted balance; balances and encumbrances carried over from previous years; and supplementary appropriations.

The SRAQ module can print **purchase orders**, generate payment vouchers, and write checks. It also supports electronic transmission of orders and claims to several vendors. A microcomputer connection to the Baker and...

...and Taylor's inventory and place orders. At the end of a session, the order information is processed by the CARL system, which generates a **purchase order** record. The CARL system can process approval and invoice tapes from Blackwell North America. It also offers an online link to Blackwell's New Titles...articles on topics of interest, or re-create the tables of contents of specific issues. When a particular journal title is searched in the bibliographic **catalog** of any CARL system library, the searcher can examine issue information for the selected title. From the issue screen, the searcher can retrieve contents information...

...Association, EBSCO, ERIC, H.W. Wilson, Information Access Company, and University Microfilms International. The available databases are listed as menu items in the public access **catalog** at CARL libraries and appear to users as locally installed information resources. Databases searches employ the same procedures supported by the CARL public access **catalog** module. Taking advantage of the excellent networking capabilities provided by Tandem computers, the CARL system supports gateway access to other automated library systems, either via the Internet or through other telecommunication facilities. As an example, CARL sites can access MELVYL, the online **catalog** of the University of California. The University of Colorado libraries have gateway access to the PaperChase search service, which offers the MEDLINE database. CARL Corporation...

...Internet connection.

The CARL system can accept any machine-readable data file for uploading, conversion to MARC-like records, and searching by the public access **catalog** module. It thus permits the local implementation of information and referral databases, directory files, or other special databases created by individual libraries. Arizona State University... system with superior capabilities for multilibrary implementations. As described above, the CARL database provides effective, efficient methods of storing duplicate bibliographic records in a union **catalog**. It maintains the variable data associated with individual libraries while maximizing storage capacity by eliminating redundant information. The CARL system operates on Tandem computers which...

...the potential for system failure. To interconnect consortium participants, the CARL system offers excellent networking capabilities based on Tandem software, while intersystem connections permit online **catalog** searches and other interaction between the various CARL sites. In this respect, CARL enjoys a leadership position among North American vendors of integrated systems. Among...

...via magnetic tape or online downloading, the cataloging module supports a direct computer-to-computer connection with OCLC. The CARL cataloger's workstation, Kid's **Catalog**, and Everybody's **Catalog** are client/server products that make effective use of graphical user interface components to simplify cataloging and OPAC searches. In its native mode, CARL's...concurrently. CARL Corporation currently has no plans to move its integrated library system to the UNIX environment. Several of its products, including the Kid's **Catalog** and Everybody's **Catalog**, are designed to interface with UNIX-based computers, however, CARL's Internet

Gateway server currently runs under the UNIX operating system.
CoBIT
3380 Tremont Road...

...the TLM system runs on multiple processors. As an authorized Data General reseller, CoBIT can provide all hardware components required by TLM installations.

For online **catalog** access, the TLM system supports any Data General terminal or any device capable of VT100 emulation, including appropriately configured microcomputers. Circulation and technical processing workstations...

...connecting terminals, printers, and other peripheral devices.

SYSTEM DESCRIPTION

A fully configured TLM system includes application components for entry and editing of cataloging information, online **catalog** searches, circulation control, acquisitions, serials management, and local mounting of reference databases. The TLM cataloging component supports the creation, editing, and maintenance of bibliographic records, authority records, and their associated indexes. As with other integrated systems, TLM's bibliographic database contains one record for each **catalog** entry. Bibliographic records are linked to item records that contain information about individual copies in a library's collection. Authority control, with cross-references, is...

...or key-entered locally, new bibliographic records are stored in a staging file for review by authorized persons and subsequent transfer to the library's **catalog**. Such transfer is performed at predetermined intervals in the batch mode. To avoid degrading system performance in critical online operations, such as **catalog** searches and circulation transactions, database updates are usually performed when the library is closed.

The TLM online public access **catalog** is fully integrated with the system's authority control and circulation control components. Crossreferences are displayed during **catalog** searches, and blind references are automatically suppressed. **Catalog** displays include information about the circulation status of specific items. They also ...

item is in transit, on hold, being repaired, or otherwise unavailable. The TLM system relies on menus, prompts, and displayed help information to facilitate online **catalog** searches by novice users. The contents of help screens can be tailored to library requirements. A dial access capability permits **catalog** searches by remote users. A dial-out option permits connections with external computer systems.

Catalog searches may involve the complete bibliographic database in a CoBIT installation or be limited to the holdings of a particular branch or collection. Cataloging records...

...designated by a library. Any field can be indexed for keyword searching.

The Boolean AND, OR, and NOT operators can be applied to keyword searches.

Catalog searches can also be qualified by publication date, material type, or other parameters.

For author, title, subject, and call number searches, the system will display...

...with a list of cataloging records in a short-title format. A detailed display can be requested for any record. The TLM online public access catalog supports two library-defined display formats. Users can toggle between them. The library specifies the fields and labels to be included in each OPAC display...

...It provides fund account capabilities for a maximum of 999 funds and 9,999 accounts. It supports key-entry of order records and printing of **purchase orders**. Order records are linked to information in a vendor database and to bibliographic data in a library's **catalog**. An enhanced acquisitions component offers additional recordkeeping, accounting, voucherizing, check writing, and report production capabilities.

To minimize typing requirements during order preparation, TLM offers an...

...EBSCO interface is utilized, a TLM system can perform an initial load of a serials control database and link subscription records to a library's **catalog**. EBSCO can also receive machine-readable claims from a TLM system.

The TLM system supports online access to community information files developed by individual libraries...flexible key-entry capabilities, as well as good support for the transfer of bibliographic and authority records from machine-readable sources. The TLM online public **catalog** module is easy to use, supports useful retrieval capabilities, and can be customized to address a specific library's requirements. The circulation control module is...

...fully integrated with other system components. The acquisitions and serials components likewise support useful capabilities. TLM installations can extend the functionality of their public access **catalogs** through local implementations of community information resources or local mounting of reference databases.

Public libraries dominate CoBIT's membership. The TLM installed base, while small...products offer similar core functionality, they differ in their optional components. The basic BiblioTech and BiblioTix modules support cataloging and database management, authority control, online **catalog** access, and report generation capabilities. These basic components are required in all BiblioTech and BiblioTix installations.

Optional application modules and capabilities include circulation control, serials...the thesaurus as a pick list to locate and select entries for authority controlled fields. Thesaurus entries can be displayed during retrieval sessions.

Online catalog **access** is part of the basic BiblioTech and BiblioTix component. Bibliographic records can be indexed by a variety of library-defined parameters. The BiblioTech system supports...

...include extensive report generation capabilities. Preformatted reports and other output documents include personal and corporate name indexes, title lists, shelf lists, accession number lists, catalog **cards**, spine labels, lists of items in circulation, lists of items on hold, labels for items on hold, overdue notices, borrower lists, serials claiming reports, and...

...and borrowers. Because BiblioTech and BiblioTix are fully integrated systems, circulation control information--including on-loan status or lost status--is incorporated into online catalog **displays**. Certain circulation capabilities are of particular interest to corporate and government libraries. For example, item categories can restrict access to specific library materials based on...

...information and the date of anticipated receipt for claiming purposes. The system then generates order forms and adds order status information to the online catalog. The optional BiblioTech accounting control modules provide additional capabilities to support acquisitions-related activities. The accounting module supports expanded order records that include the name of the person who requested an item, billing and shipping addresses, a vendor identifier, a fund identifier, requisition and purchase **order numbers**, claiming dates, and renewal periods for subscriptions. The accounting module can process purchase **requisitions** and purchase **orders** in batches or on demand. It updates fund accounts by automatically encumbering appropriate amounts and recording expenditures when invoices are paid. Records in a vendor database...

...addition to the basic BiblioTech and BiblioTix components. In such implementations, information from the periodicals control module is integrated with a library's online catalog and circulation control modules. The optional accounting module, as described above, maintains price, vendor, and other information for specific subscriptions. The periodicals control module can also function as a stand-alone serials control system in libraries that do not require online catalog **access**, circulation control, or other capabilities supported by a complete BiblioTech or BiblioTix implementation. Whether operating as a self-contained product or integrated with other system...

...retrieval package, such as TOPIC, Excalibur, or TRIP. Alternatively, Comstow offers a text-enabling or image-enabling capability that uses the BiblioTech or BiblioTix catalog **access** module as a search engine for text or image files. When bibliographic citations are retrieved during a catalog **search**, their associated text or image documents can be invoked by a function key.

The BiblioTech and BiblioTix systems support local mounting of reference databases. The information is recorded in the BiblioTech and BiblioTix central databases and is fully integrated with the online catalog **access** module. Some Comstow customers obtain reference databases on magnetic tape directly from information publishers; others use Comstow's interface capabilities to download citations from online...

...ROM information products.

Comstow's CD-ROM access module permits searching of CD-ROM information products through the BiblioTech or BiblioTix online public access catalog. An opening menu lists CD-ROM searching as a retrieval option for OPAC users. When that option is selected, the system lists the available CD-ROM...

...experience in Comstow installations. Maxant (1990) describes a BiblioTech implementation at Raytheon Company. Smith and Lucchetti (1990) describe an interface between the BiblioTech online catalog and CD-ROM databases at Ford Motor Company's technical information center. Brown (1991) discusses an interface between BiblioTech and EBSCONET.

COMPETITIVE ANALYSIS
Comstow has been...

...by online information services. The optional thesaurus module provides advanced authority control capabilities.

To accommodate novice and experienced users, the BiblioTech and BiblioTix online catalog **access** modules support menu- and command-driven search modes. Access to classified information can be restricted by passwords. The BiblioTech and BiblioTix circulation control and acquisitions...potential; the latest edition of the American Library Directory (New York: Bowker, 1994) lists more than 9,000 special libraries in North America, excluding law, **medical**, and religious libraries as well as special libraries associated with public libraries and academic institutions. For their part, the BiblioTech and BiblioTix systems have enjoyed...

...cost of system implementation, this approach has the advantage of using an organization's existing infrastructure of interactive terminals and communication facilities for online catalog **access**. The BiblioTech and BiblioTix systems, as described above, are marketed as software packages for implementation on customer-supplied computers. Both products

are compatible with a...or peripheral devices.

SYSTEM DESCRIPTION

As an integrated system, DOBIS/LIBIS employs a single bibliographic database to support multiple library operations, including cataloging, online catalog **access**, circulation control, acquisitions, and serials control. The serials control module, which was once offered as a separate component, is now part of the DOBIS/LIBIS...

...a single library, some of its most interesting features are designed for installations involving multiple libraries. The system's bibliographic database is a union catalog **for** participating libraries. Holdings, circulation control, acquisitions, and periodicals control information are stored in separate local files that are linked to records in the bibliographic database. If desired, participating libraries can also maintain local catalogs **with** special subject headings or other information that supplements or replaces the information contained in the union catalog. **For** maximum flexibility, local data files may be subdivided by branch or department.

Descriptions of DOBIS/LIBIS application components are complicated by the fact that most...

...fields. Authority files, incorporating cross-references and scope notes, are conveniently accessible online. Global heading changes are possible.

Cross-references are incorporated into online catalog **displays**. The DOBIS/LIBIS system includes batch programs to produce catalog **cards** as well as book catalogs **in** paper or computer-output microfilm formats. Libraries can specify catalog **card** sizes and layouts. Book-form catalogs **can** be arranged by main entry, title, or call number. Entries can be based on the entire database or on specified subsets.

DOBIS/LIBIS supports online catalog **searches** by library users and staff members. The search process is driven by menus and prompts. A command bypass is provided for experienced users. Operator-selectable...

...other languages. As one of its enhancements, Version 3.0 of DOBIS/LIBIS supports context-sensitive help screens for the various steps in the catalog **search** process. The contents of help screens can be defined by individual libraries. Help screens can span multiple pages. In 1994, ELIAS introduced a microcomputer - based...

...3.0 or 3.1, is required for interaction with the DOBIS/LIBIS host computer.

Searches can be conducted in either the complete system catalog **or** in local catalogs (**if** they exist). With DOBIS/LIBIS, Version 3.0, searches can be limited to the collections of specific branches **or**, more restrictively, to items within given...middle of the screen. The bottom portion of the screen displays user prompts,

instructions, and menus of mnemonic codes that initiate particular operations. For catalog **searches** that involve a unique identifier, such as an ISBN or LCCN, the system responds with the display of the indicated bibliographic record. In other cases...

...NOT operators. Numbered sets can be displayed, deleted, or printed.

The DOBIS/LIBIS circulation control capability is fully integrated with the cataloging and online catalog **access** modules. Circulation transaction records are created when items are charged out. They are linked to corresponding bibliographic and copy records. Circulation status is indicated in catalog **displays**. When items are checked in, the transaction records and linkages are deleted. If returned items are overdue, a record is created in a fines file...

...by authorized persons or downloaded from external sources. Records in the bibliographic pool can be retrieved through the same access points employed in online catalog **searches**.

The acquisitions module can print single- or multi-item purchase **orders** or letters of request, including interlibrary loan requests. To simplify order preparation, default printing requirements can be associated with specific vendors. Order status information can be retrieved online by order number or through any of the bibliographic access points employed in online catalog **searches**. Vendor records can be retrieved by name. Fund records can be retrieved by number. The invoice file can be searched at specified intervals for completed...percent of the installed sites. Approximately 29 percent of ELIAS installations are in Spain, where a group of large universities has undertaken a union catalog **implementation** called RUEDO (Red Universitaria Espanola DOBIS/LIBIS). North American libraries account for 14 percent of the DOBIS/LIBIS installed base; 8 percent of DOBIS/LIBIS...

...service. Van de Gien (1988) describes a DOBIS/LIBIS implementation at Delft University of Technology. Dickenmann and Straub (1989) discuss a DOBIS/LIBIS union catalog **implementation** involving more than 40 library collections at Zurich University. Walther (1989) discusses the use of DOBIS/LIBIS for circulation control at Ciba-Geigy in Switzerland...

...Hanif (1985), Horton (1990), Khurshid (1983, 1984, 1986, 1987, 1992, 1992a, 1994), and Nazir (1984) examine the use of DOBIS/LIBIS for cataloging, online catalog **access**, acquisitions, and serials control at King Fahd University of Petroleum and Minerals, one of the system's most widely publicized installations. Cheng (1986, 1988) and...DOBIS/LIBIS provides effective automated support for the five major operations customarily supported by mainframe- and minicomputer-based integrated library systems: cataloging, online public catalog **access**, circulation control, acquisitions, and serials control. Among its

distinctive and potentially useful features, DOBIS/LIBIS can link related bibliographic records, thereby defining relationships between works that are published in multiple formats or languages. Bibliographic records can incorporate multiple abstracts. Batch programs can produce catalog cards as well as book-form catalogs in paper or microform. The DOBIS/LIBIS online catalog is easy to use and provides flexible, powerful retrieval capabilities with excellent support for Boolean operations. Records can be retrieved by many access points, including keywords...

...Others, such as Z39.50 capabilities, are of limited interest among European libraries, which have undertaken other networking arrangements.

For example, the RUEDO union catalog **implementation** operates on a computer at the University of Oviedo. Participants include the universities of Deusto, Granada, Navarra, Oviedo, Salamanca, and Sevilla, as well as the ...for acquisitions. ELIAS is also developing a series of microcomputer-based enhancements and support products to address specific needs; as described above, the GUIDO catalog **searching** interface and the DOBILUS circulation control component are examples of such developments. Among its advantages, the implementation of microcomputer-based enhancements does not require substantial...

...is confidential, ELIAS plans to deliver the initial application module in the third quarter of 1995. It will support cataloging, authority control, and online catalog **access**. Modules for circulation control, acquisitions, serials control, interlibrary loan, and management reporting will follow at unspecified dates. ELIAS plans to broaden Alexandria's scope to...the VT-100 and VT-220, that cannot accommodate them.

SYSTEM DESCRIPTION

ALEPH is a fully integrated system with application modules for cataloging, online catalog **access**, circulation control, acquisitions, serials control, and image management. ALEPH is compatible with single-computer or networked implementations. Single-computer implementations may involve a single library...

...global editing of authority files. Changes in an authority record automatically modify the corresponding field values in cataloging records.

The ALEPH online public access catalog **module** supports beginner-and expert-mode searching. In either mode, users can retrieve a bibliographic record or set of records based on specified criteria, request additional...as the holdings of one library in a consortium installation.

In networked implementations involving ALEPH installations in multiple

libraries, ALEPH can maintain a union catalog **of** holdings at all participating sites. The union catalog's interface and search procedures are identical to the local library interface. Any networked computer and library catalog **can** be accessed from any site during an online search session. In such networked implementations, participants' holdings information is consolidated. ALEPH displays a list of libraries...

...for photocopy requests or other special capabilities. Borrower records can be retrieved by name, identification number, or barcode number. The circulation control and online catalog **access** modules are integrated. Holdings displays contain circulation status information, including due dates. Using the OPAC module, registered borrowers can view and renew items on loan...

...can be defined and modified as required. Different rates can be assigned to various phases of the procurement cycle, including encumbering, invoicing, and payment. Purchase **orders and** claims can be printed online or in batches. The ALEPH system can accommodate up to nine different order forms and claim letters. The acquisitions module catalog. **Enumeration** information for individual issues is automatically generated from library-defined publication patterns. Claiming of missing issues can be performed online or through a batch utility...

...added, or deleted.

The ALEPH image management module supports a database of digitized images that are linked to bibliographic records in a library's catalog. The images are generated by scanners and displayed in pop-up windows during catalog **searches**. If more than one image is linked to a catalog **record**, the user is prompted for an image number. The ALEPH system supports local mounting of reference databases, provided that such databases are converted to the...

...such as office documents and engineering drawings. Libraries can define field names, tags, and sequences. Libraries can create multiple workforms for key-entry of catalog **records**. Any field can be indexed within database records. Any field can be a repeating field. No minimum information is required in cataloging records. Authority control can be applied to any field. Installations can have multiple authority files.

The online catalog's user interface can be implemented in different languages. Menu titles, operator prompts, help screens, and other catalog **components** can be customized for specific installations. Libraries can define many different display formats for bibliographic and holdings information.

As previously discussed, the ALEPH system was...

...may serve a single library or multiple libraries. At any ALEPH site, individual libraries can have their own databases or participate in a union catalog; in Israel, for example, various library collections are individually identified in OPAC menus, but the databases maintained at interconnected ALEPH sites comprise a national union catalog. In keeping with the ALEPH program's emphasis on flexibility and adaptability, individual participants in networked implementations can define their own authority control practices, circulation policies...

...fully integrated system that would support multiple library operations. Like competing products, ALEPH is modular in design. Among its excellent core components, the online catalog **access** module is particularly noteworthy for its powerful and versatile retrieval capabilities. It incorporates a menu-driven search mode for novices and a command-mode for truncation of search terms, Boolean operators, proximity operators, and command stacking. In networked installations, library catalogs at any connected site can be accessed during an online search session. Unusual features include SDI capabilities and the ability to receive database queries from remote users via electronic mail. The ALEPH catalog **access** module also allows users to place photocopy requests for retrieved items. Digitized images can be integrated with bibliographic records for display during OPAC searches.

The automation system for IBM AS/400 computers. In its initial configuration, LMS supported cataloging, online catalog **access**, circulation control, and acquisitions support. It has since been enhanced to incorporate authority control, a barcode-generation capability, and a Search Alternate Module (SAM) that...

...systems have been installed on customer-provided AS/400 systems.

SYSTEM DESCRIPTION

The Gateway Library Management System supports computer-based cataloging, authority control, online catalog **access**, circulation control, a simple acquisitions component, and local mounting of reference databases. A fully integrated system, it uses a single bibliographic database to support multiple program operations. As with other integrated systems, the LMS bibliographic database contains one record for each catalog **entry**. Bibliographic records are linked to item records that contain information about individual copies in a library's collection. The Gateway cataloging module supports the creation...subset of these retrieval capabilities for online public access, which is facilitated by customized menus and online help information. In consortia or multibranch implementations, catalog **searches** can be performed on the entire bibliographic database. Alternatively, searches can be limited to the

holdings of a particular library or category of libraries, such...

...Title searches can include alternate titles, such as uniform titles
or
foreign language titles.

For author, title, and call number searches, the LMS online catalog
access module displays an exact or closest matching entry at the top of the screen, followed by an alphabetic or numeric list of other field entries...

...location, and availability information. The title field can include an alternate title. More complete bibliographic information can be displayed in a labeled-field or catalog **card** format. A full MARC display is also possible. A searcher can request availability information for each volume in a multivolume set. Retrieved records can be printed with labeled fields or in a catalog **card** format. Alternatively, titles can be printed in a bibliographic listing, which can be limited by material type, publication date, or other parameters.

The LMS circulation...

...placed at the title level by library staff members or registered borrowers. The hold capability can be accessed through the circulation function or from catalog **searches**. Items can be reserved for the ...Detroit Public Schools. A desired database is selected from a search menu that can contain up to nine selections, including the library's own catalog. **Menus** can be customized for individual libraries in consortia or multibranch implementations. Any database loaded on the AS/400 can be stored, indexed, and accessed as...

...separate information resource or combined with other databases. Searches of reference databases employ the same retrieval procedures supported by the LMS online public access catalog. The SAM component can also provide gateway access to the Internet, to online information services such as DIALOG or CompuServe, or to locally installed CD-ROM...library map during OPAC searches. Client/server technology will also support CD-ROM and multimedia applications, the use of optical character recognition to convert catalog **cards** to MARC format records, and barcode printing directly from a Windows-based microcomputer.

GEAC COMPUTER CORPORATION

11 Allstate Parkway Markham, Ontario L3R 9T8 Canada (416...
...with medium-size and larger academic libraries in North America and elsewhere. Initially limited to circulation control, it was subsequently augmented to include online catalog **access** and acquisitions capabilities. Chepesiuk (1991) reviews the company's history and library

automation activities.

Despite considerable success in the library market, Geac experienced considerable financial...specific capabilities are implemented within each module.

Like competing products, the ADVANCE and PLUS systems include application modules for cataloging and authority control, online catalog **access**, and circulation control. These modules are installed at all ADVANCE and PLUS sites. In its latest version, Release 5.0, the ADVANCE system supports optional...requirements, default field values can be specified. The PLUS system includes a special workflow for records that are to be suppressed during public access catalog **searches**. With the ADVANCE system, newly created cataloging records enter a workfile for validation prior to inclusion in the main bibliographic database. Records can be indexed...

...subject authority files. The systems will search authority records when data are entered into an authority-controlled field.

The ADVANCE and PLUS public access catalog **modules** support similar retrieval capabilities, but each system offers special features that can prove advantageous in particular situations. In the default search mode, both systems are...

...to the NISO Z39.58 standard, "Common Command Language for Online Interactive Information Retrieval." The layout and content of OPAC screens can be customized. Catalog **records** can be browsed by author, title, subject, series, and call number. In ADVANCE installations, browsable indexes can also be generated for numeric fields, such as ISBN and music publisher number. Authority control is integrated with catalog **displays**; browsable indexes include cross-references. As an unusual feature, ADVANCE permits cross-index searches, such as author-title combinations. Root-word searches and the Boolean...

...searches performed at each terminal, as well as information about searches that do not retrieve direct matches.

When displayed in the full format, retrieved catalog **records** include library-defined fields and subfields, each of which is clearly labeled. Circulation status information is included. With the ADVANCE system, information about titles on order can be optionally displayed in the public access catalog. **Item** displays include such information as price, circulation counts, due dates, and the last transaction date. Through the public access catalog **module**, ADVANCE users can place and cancel title-level holds. They can also display the hold queue and specify pickup locations. This capability can be controlled...
...allows properly identified users to examine their own borrower records.

Both the ADVANCE and PLUS systems permit dial-in access to the public access catalog **module** at transmission rates ranging from 300 to

19,200 bits per second. Gateway access is also provided to remote computer systems.

Like their counterparts in...algorithms. The system will estimate the cost of subscription renewals based on previously invoiced amounts, emphasizing the most recent subscription prices.

Libraries can define purchase **order formats** for various purposes, as well as the data fields to be included in each purchase **order**. **Order** dates and other default information are automatically supplied by the system. As an alternative to printed purchase **orders**, **ADVANCE** supports electronic data interchange in the BISAC format. The system's optional BISAC interface allows libraries to define BISAC vendors, create and transmit electronic orders...

...receive order confirmations. The BISAC interface uses UNIX asynchronous communication protocols.

The bibliographic portion of order records can be added to the public access catalog **when** entered or routed to cataloging workfiles. As previously noted, records for items on order can be accessed through the OPAC. Fund balances are checked at...

...modules that provide online access to periodical indexes and other reference databases, using terminals and retrieval procedures supported by each system's public access catalog **module**. Reference databases are maintained in separate files, apart from a library's main bibliographic database, but a link can be established between journal citations and...

...microcomputer-based companion product for **ADVANCE** and GLIS systems. It permits the addition of artistic or photographic images to a library's public access catalog. **Images** are captured in live-video or snapshot modes by an image processor board and video camera. Images can be edited by software provided for that purpose. They can be accessed through the public access catalog **module** by various parameters, including title, author/artist, subject, and call number. Stand-alone and networked implementations are available. Images are displayed on VGA monitors. Kloosterman...Both systems provide consistent commands and display formats across all application modules. Both systems offer cataloging with authority control, interfaces to bibliographic utilities, flexible catalog **access** capabilities, versatile circulation control features, and local mounting of reference databases. Some components, such as voice notification and ADA-compliant workstations, are supported by both...for customers, particularly those outside of the United States.

SYSTEM DESCRIPTION

TINLIB is a modular integrated library system that supports

cataloging, authority control, online catalog **access**, circulation control, acquisitions, serials control, and interlibrary loan. Additional modules are available for record import and export, report generation, and data communications. As noted above...

...not opened if a field value is identical to an existing entry. Authority records can be edited within windows.

TINLIB supports online retrieval of catalog **records** in various ways. For inexperienced or untrained users, the program provides a "browse and navigate" mode that is menu-driven and easily learned. The user...a previously saved search.

TINLIB's circulation control capabilities are fully integrated with the cataloging module. The circulation status of items is displayed when catalog **records** are retrieved. Circulation transactions are governed by library-specified parameters for borrower and item categories. Borrower records can be created in advance or at the...

...and various types of circulation statistics. TINLIB incorporates a report generator module that allows libraries to develop customized circulation reports as well as bibliographies, catalogs, **and** other printed output.

TINLIB's acquisitions and serials control modules are fully integrated with other program components and with each other. The two modules share...

...records is facilitated by an acquisitions template. It combines author, title, imprint, ISBN, and other bibliographic information with such order-specific data elements as purchase **order number**, type of order, requester, supplier code, number of copies, price, invoice address, and handling instructions. Templates permit single-item and multi-item orders. Purchase **orders** can be printed individually or in batches. The latter can be sorted by purchase **order number** or by vendor. Order records can be retrieved by title, purchase **order number**, vendor, or requester. An invoice template is used to authorize payment for received items. The acquisitions module can generate claiming and cancellation notices for overdue...

...capabilities. Page headings, margins, indentations, field positions, and other attributes can be tailored to specific application requirements. Bibliographic records can be printed in a catalog **card** format. Tabulations can be based on arithmetic functions, averages, and percentages. Output can be saved in the DIF format for processing by spreadsheet software packages...a thesaurus module provides extensive authority control capabilities for libraries with complex subject indexing requirements. The powerful retrieval capabilities supported by TINLIB's online catalog **access** module are comparable to those supported by

the online information services that special libraries have utilized for several decades. The TINLIB serials control module can...translated into various European and Asian languages, and multilingual implementations are possible. A TINLIB installation at the University of Cyprus, for example, features online catalog **access** with Greek- and English-language interfaces. Bilingual capabilities were an important consideration in TINLIB's selection by the Northern Lights Regional Library, a 15-member...

...BASISplus as its underlying database engine. Its predecessor, known as TECHLIB/STACS, was the result of a project to automate a customer's library catalog **using** BASIS. The commercially available implementation, which was introduced in 1984, combined the cataloging, circulation control, and acquisition components supported by the TECHLIB program with a...

...is modular in design. A basic implementation includes three components:

(1) the BASISplus program, which provides database management and transaction processing capabilities; (2) a catalog/**maintenance** component, which supports online data entry and maintenance for bibliographic records and other information, such as borrower and vendor records, employed in a TECHLIBplus implementation; and (3) an online public access catalog. **Optional** components include circulation, acquisitions, and serials control modules; a MARC interface module that can import bibliographic data from various external sources; a Windows-based online catalog **access** program; and a local mounting capability for reference databases.

As with competing products, cataloging information can be key-entered or imported in machine-readable form from external sources. The system's catalog/**maintenance** component supports the key-entry, online editing, and deletion of cataloging records and holdings information. Displayed workforms with clearly labeled fields facilitate data entry. Workforms...

...of library materials, including monographs, technical reports, and serials. A library can create additional workforms and install them as selections on the system's catalog/**maintenance** menu. Data validation procedures and criteria can be tailored to library requirements. The system incorporates safeguards to ensure database integrity; for example, a copy record cannot be created unless its associated catalog **record** has already been entered.

The optional MARC interface module can load bibliographic records

from external sources for initial database creation or to update a library's catalog on an ongoing basis. It can accept LC-formatted or OCLC-formatted data tapes produced by national libraries, bibliographic utilities, retrospective conversion services, book jobbers, and...

...can be loaded from external sources. Information Dimensions offers a version of Houghton Mifflin's Roget's Electronic Thesaurus.

The TECHLIBplus online public access catalog can operate in screen-oriented and command-oriented search modes. Intended for novice users or those with straightforward retrieval requirements, the screen-oriented search mode employs query...

...placed in a Boolean OR relationship. Multiple terms separated by spaces

are treated as a phrase for searching purposes. The online public access

catalog module also permits keyword searches in author, title, and subject fields. In keyword searching, as opposed to field-specific searching, all fields are searched at once. Depending...

...are entered, multiple keywords are placed in a Boolean AND or Boolean OR

relationship. Single-character or multi-character wildcard characters can

be included in search terms to perform term truncation or to compensate for variant spellings. Wildcard symbols also can be used in call

number searches to retrieve records from a designated segment...to 99 screens per record. Where permitted by local operating procedures,

users can request check-out or holds for items retrieved by online catalog searches.

As an alternative to the standard public access catalog, TECHLIBplus supports an optional OPAC for Windows module that relies on pull-down menus, dialog boxes, icons, point-and-click operations, and other graphical user interface components...

...appropriate to the computing environment in which TECHLIBplus is implemented. In addition to the retrieval capabilities supported by the integral TECHLIBplus public access catalog component, the OPAC for Windows module provides a hypertext feature that can launch a catalog search based on selected words contained in retrieved records.

The TECHLIBplus circulation control module supports check-out, check-in, renewals, holds, recalls, fine calculation, and related circulation...

...on hold or for borrowers with overdue books or excessive fines. Because

TECHLIBplus is an integrated system, circulation status is included in online catalog displays. Holds can be placed at title or copy levels. The circulation control module can produce a variety of borrower notices and printed reports. Examples include inventory...

...regular single-title and multi-title orders, standing orders, approval

plans, subscriptions, prepaid or credit card orders, and rental agreements.

Order entry and purchase order **creation** are performed online, using formatted screens. Purchase orders can be printed in various formats, including ANSI order slips, ANSI multiple-title order forms, and company-specific purchase orders. **Formatted screens** are provided for creation and maintenance of vendor records. The module can also generate acquisitions records for gifts or interlibrary loan. Items and invoices can...

...rely on menus and formatted screens. A subscription maintenance function contains information about enumeration, renewal periods, and publication patterns for specific serials. Temporary catalog records can be created for new subscriptions. Claim forms are generated for late issues. A routing maintenance function creates routing slips for issues and tables of contents...to handle large amounts of text. Libraries can consequently add abstracts, tables of contents, or even the complete text of documents to TECHLIBplus catalog records. **These** entries can be indexed for full-text retrieval. In addition, a library can link digitized document images, computer-generated graphics, marked-up word processing documents...

...thesaurus module provides advanced authority control features and supports powerful retrieval options, such as synonym identification and alternate language searching.

The TECHLIBplus online catalog access **module** supports a broad range of search capabilities. Screen and command modes are provided for novice and experienced users, respectively. Expert users can take advantage of...

...base OPAC module for users that prefer a graphical user interface. Other TECHLIBplus modules are intelligently conceived and fully integrated with the online catalog component. **As** might be expected of a product that is built upon a solid general-purpose database engine, TECHLIBplus provides very good report generation capabilities.

TECHLIBplus can...by the customer without on-site assistance from ILS.

SYSTEM DESCRIPTION
SydneyPLUS is an integrated, modular library automation system that supports cataloging, online catalog access, **circulation** control, acquisitions, serials control, materials booking, report generation, and document imaging. A minimally configured SydneyPLUS system includes cataloging and online catalog access **as** required components. The other application modules are optional and can be added at any time. An

optional customization module allows certain program characteristics to be

...

...or overwriting it with an imported record. The MARC Record Interface module can also export records in the USMARC format. It merges SydneyPLUS catalog records with the required MARC tags and punctuation.

To facilitate original cataloging, SydneyPLUS displays formatted screens as templates for key-entry of bibliographic records. The templates, which...the same subject as a previously retrieved record. If desired, the system manager can define security clearances necessary to access a library's catalog. Program **level** security uses password protection to control access to the query module. Access to specific records and fields can be limited to users with designated privileges.

As an unusual feature, ILS offers a Remote Public Access Catalog (RPAC) **module** that will copy a library's catalog, menus, and inquiry programs onto diskettes. In that form, the catalog can be distributed to persons or organizations who want to search it on their own computers. RPAC components can be customized to distribute data via magnetic tapes...

...of borrowers and library materials. If desired, a library can prohibit circulation of particular types of materials to specific borrower categories. Like online catalog access, the SydneyPLUS circulation control module is selected from the program's master menu. Check-out, check-in, renewal, and other circulation transactions are performed in real

...

...or pre-encumbered accounts. Order records are created by completing a formatted screen that solicits bibliographic information and such order-specific data as purchase order **number**, **supplier** name, order type, number of copies, and charge code. Order records can be retrieved by title, purchase order **number**, **vendor** name, vendor number, ISBN, or ISSN. Vendor information is maintained in a separate file that is linked to entries in individual orders. Purchase orders can be printed or transferred to a disk file. Invoice records are created and requester notices generated when items are received. Claiming letters can be printed individually...

...serials information is accessible from other application modules. Serials records can be edited with the cataloging module and retrieved through the public access catalog. If desired, a database of abstracts can be created for online searching via the program's query module. Individual issues can be circulated with the circulation control...

pick lists, packing slips, mailing labels, and overdue notices. The materials booking module is fully integrated with other SydneyPLUS components, including the online catalog and the circulation control module's borrower file.

The SydneyPLUS imaging module is a microcomputer-based component that

permits the storage and retrieval of digitized images produced... installations, most notably at the New York Public Library, where a widely publicized Carlyle system replaced one of the world's largest card catalogs. In 1987, Carlyle sold 22 systems and its worldwide installed base totaled 40 sites. During the late 1980s, the company added sales and support staff in anticipation...

...random-access memory, a 120-megabyte hard disk drive, and a color monitor. MARCorp also supports a character-oriented interface that permits online catalog searches from VT100-compatible terminals or from microcomputers configured with VT100 emulation software. IBM-compatible microcomputers can support a variety of ADA-compliant hardware and software products.

SYSTEM DESCRIPTION

In its initial implementation, the Carlyle system supported cataloging and an online public access catalog; circulation **control** and other application modules were subsequently added to Carlyle's original configuration. As a new product, Voyager was designed from the outset as a fully integrated system with application modules for cataloging, online public catalog access, **circulation** control, acquisitions, and serials control. MARCorp also offers a CD-ROM gateway component and an image-capable variant of the public access catalog.

The **Voyager** cataloging module supports the creation, editing, and maintenance of bibliographic and authority records. As with ... imported from archival tapes. Imported records can be transferred to a work

file for later review or added directly to a library's catalog.

MARCorp's graphical user interface relies heavily on windows-oriented displays, pull-down menus, dialog boxes, mouse operations, and function key assignments. Specially designed workforms simplify key...

...selection; alternatively, a new authority record can be created and edited in the same manner as bibliographic records.

Voyager's online public access catalog component **supports** both text and graphical user interfaces. The former is compatible with conventional ASCII-type video terminals; the latter, which makes extensive use of pull-down...

...MARCorp provides a modifiable stoplist. The Voyager OPAC module permits browsable searches by author, title, and subject headings. Cross-references are displayed for catalog searches **involving** authority-controlled fields. Boolean operators can be used to broaden or narrow searches. Context-sensitive help information is conveniently accessible.

Retrieved catalog records **can** be displayed in brief or full formats. A MARC display capability is also provided. Holdings information,

including circulation status, is integrated with bibliographic records.

As

...

...the Voyager OPAC module can display a map of the library, indicating the approximate location of an item. In addition to its conventional catalog module, **MARCorp** offers the ImageOPAC component, which provides online access to digitized images and sounds linked to specific bibliographic records. Images--which may be captured from photographs...

...pre-order review and selection. Acquisitions capabilities are fully integrated with other Voyager application modules. On-order status is indicated in OPAC displays. Purchase orders **can be** printed or generated electronically in the BISAC format. ANSI X. 12 electronic data interchange capabilities are planned for future availability. Fund names and categories are...

...manager expenditures and encumbrances for multilevels funds for single-year or multi-year budget periods. Currency conversion is performed automatically. In addition to purchase orders, **the acquisitions** module can print claims, vouchers, checks, cancellation notices, and a variety of lists and statistical reports.

The Voyager acquisitions module is used to prepare orders in records can be based on data transferred from the acquisitions module or from bibliographic information retrieved from a library's catalog. Multiple **windows** and graphical user interface components facilitate the completion of check-in, claiming, and related tasks for specific issues.

Voyager's prediction algorithm for check-in...

...installations are in California.

COMPETITIVE ANALYSIS

As described above, MARCorp's Voyager system provides excellent functionality for the five basic applications (cataloging, online catalog access, **circulation** control, acquisitions, and serials control) customarily supported by integrated library systems. Modular in design and heavily parameterized, it can address a broad range of library requirements. The Voyager cataloging module can import bibliographic records from various machine-readable sources, and features an integral authority control component. The online catalog access **module** is easy to use and supports a useful range of indexing and retrieval capabilities. The circulation control module is well suited to multibranch and consortium...world's most familiar graphical user interface, MARCorp subsequently introduced client software for Windows-based microcomputers.

The initial Windows implementations support cataloging, online catalog

access, **and** circulation control. They make effective use of icons, pull-down menus, dialog boxes, and other Windows components. The Windows-based cataloging client employs a full...

...IBM.

SYSTEM DESCRIPTION

AARCS is a fully integrated library automation system of modular design. Application components are available for cataloging, authority control, online catalog access, **circulation control**, acquisitions and serials, media booking, community information and referral, and local mounting of reference databases. The AARCS cataloging module supports the creation, editing, and...

...for which MARC formats are unavailable or inappropriate.

Cataloging records can be key-entered or transferred from machine-readable sources. An optional MARC Catalog Processing **module** can import MARC-format records from magnetic tapes produced by national libraries, bibliographic utilities, retrospective conversion companies, book jobbers, or other sources. The library must...

...the magnetic tape supplier in order to verify the format of the MARC records and the location of holdings information. An optional Micro Catalog

Processing **module** can import MARC-format records downloaded from CD-ROM information products, OCLC workstations, and other microcomputer-based systems.

Authority records can be key-entered or...

...editing of headings and global deletion of blind references are supported.

To accommodate both novice and experienced users, the AARCS online public access catalog module **supports** menu- and command-driven search modes. Bibliographic records can be retrieved by authors, titles, subject headings, or keywords. The AARCS system can index any library...or consortia installations. Holds can be placed on library materials at the title or copy level.

Circulation status information is incorporated into online catalog displays. **Registered** borrowers can place holds on library materials from authorized public access terminals. Borrower records can be key-entered or imported from machine-readable sources. Information...

...single- and multi-item orders, approval plans, standing orders, subscriptions, and gifts. Formatted screens facilitate the entry of order information. The AARCS online catalog can **be** used for pre-order searching and transfer of bibliographic information into order records. When an order is placed, the module automatically registers an encumbrance against...

...checked in, or on demand. AARCS can generate various acquisitions and serials control reports, including lists of items on order, lists of open purchase orders, **lists of** items received or claimed, and vendor performance summaries.

The AARCS A/V Booking module provides comprehensive reservation and circulation control capabilities for media, equipment, and...
...collected. Barcode labels facilitate item check-out and check-in. Records for media, equipment, and facilities can be included in a libraries online catalog.

As an adjunct to the online catalog module, the AARCS community information and referral module supports online availability of information about library services, community resources, group meetings, and other local organizations and events. The...

...citation module permits local mounting of reference databases for searching by the same procedures that are used to search a library's online catalog. It can load reference databases from any information publisher that supports the USMARC format. NSC has loaded databases from H.W. Wilson, Information Access Company, and UMI...

...command-driven modes for novice and experienced searchers, respectively. Where library requirements exceed the author, title, and subject searches customarily supported by card catalogs, any **field** within bibliographic records can be indexed for online retrieval. Boolean operators and proximity commands provide advanced search capabilities. The AARCS circulation ...as a standalone system, provides good reservation and circulation control for media, equipment, and facilities. To extend the functionality of the AARCS online catalog, NSC **offers** a community information and referral module and local mounting of reference databases. With the introduction of IBM's AS/400 Client/Server system, NSC plans...
...a statement of direction indicating its intention to develop Z39.50 capabilities. Some NSC installations currently offer dial-up access to their online catalog, and **several** are reviewing the possibility of Internet connections.

As a relatively small company, NSC is not as well known as some other integrated system vendors discussed...

...system designed for standalone operation at customer sites. That system, known as LIBERTAS, was introduced in 1986. Its initial configuration supported online public catalog access, as well cataloging and

circulation control. By the early 1990s, SWALCAP's U.K. customer base was entirely converted to LIBERTAS from the shared system, which...terminals or microcomputers configured with VT emulation software. Special terminals are not required for specific system activities, such as circulation control or online catalog access. **LIBERTAS** supports all characters in the UKMARC character set. When appropriate terminals are employed, special characters and diacritics can be displayed.

SYSTEM DESCRIPTION

The LIBERTAS system includes application modules for cataloging, online public catalog access, **circulation** control, acquisitions and serials control, interlibrary loan, and gateway access to external computer systems. LIBERTAS also supports a report generator that can produce printed output...

...than 9 million bibliographic records. It incorporates the LC MARC, British National Bibliography, and Whitaker's Books in Print databases plus the Union Catalogue File (**UCF**), which contains bibliographic records from approximately 30 university libraries. LIBERTAS also supports an interface to the OCLC database. A newly developed interface will transfer bibliographic...

...files are automatically constructed from designated fields within cataloging records. Authority files can be searched online from within the cataloging and public access catalog modules. **Authority** files can include cross-references. Authority control operates in an online, interactive mode. When a bibliographic record is entered at a cataloging terminal, the operator...

...alerts the operator to unauthorized headings. LIBERTAS also validates

ISBNs and checks for records with duplicate control numbers.

The LIBERTAS online public access catalog incorporates **ideas** that were developed during the OKAPI research project at the Polytechnic University of Central London. That project is described in various publications, including Hancock (1992)...

...as nine languages simultaneously. Interface languages can be specified on a systemwide basis, associated with specific terminals, or selected by the user. The catalog access **module** supports index browsing and keyword searches. The system will display scrollable lists of authors, titles, subject headings, and call numbers. Cross-references are included in...

...records in call number sequence.

Any field within a library's bibliographic records can be indexed for keyword searching. The LIBERTAS public access catalog supports **implicit** and explicit Boolean operations and right truncation of search terms. Implicit truncation and fuzzy retrieval algorithms increase the likelihood that the user's search strategy...items on hold. The circulation status of individual items is indicated in OPAC displays. Registered borrowers can place holds on materials retrieved during catalog searches. **SLS** recently signed a reseller agreement for the 3M Self Check system (known in the U.K. as the 3M 5210 Self Issue system), which it

...

...book identifiers, such as International Standard Book Numbers or BNB numbers. When order information is entered, LIBERTAS will automatically check a library's catalog for **items** with duplicate control numbers. All procurement transactions are recorded against designated funds. LIBERTAS warns the operator when fund allocations approach a predetermined limit. The limit...

...stored as bibliographic records that can be updated to full cataloging records. On-order status is indicated in OPAC displays. The public access catalog can **also** indicate that received items have been transferred to the cataloging department for further processing.

As noted above, the LIBERTAS acquisitions module accommodates subscriptions to magazines...

...supports receipt and claiming of individual issues. Order records for serial publications can be retrieved by volume or issue number. The public access catalog module **supports** retrieval by other parameters. LIBERTAS can generate bindery orders and track items that have been sent to a bindery. The LIBERTAS system can generate a...

...access users at one site to search the database at other LIBERTAS sites. The interconnected sites can be listed in the public access catalog's **opening** menu. Search privileges are defined by user names and passwords that are allocated by the remote system. The Access and Transfer module also supports the...

...information resources available on the Internet, JANET, IBERPAC, or other computer networks. The external access option can be listed in the public access catalog's **opening** menu. Network access options are stored in parameter files. As many as 100 information services can ...or national level are more common than they are in the United States. As described above, LIBERTAS sites can be connected--for online catalog

access, **transfer** of bibliographic records, or other purposes--through public or private X.25 networking facilities. LIBERTAS also supports gateway access to other computer systems and information... the cataloging, OPAC, circulation control, acquisitions, and serials control modules customarily supported by competing integrated systems. With the exception of cataloging and online catalog access, LIBERTAS implementations can be limited to those modules required by a particular library at a given time. Other modules can be added when needed. Many system...

...activities will place increased emphasis on platform independence and client/server technology.

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Integrated library systems for microcomputers and mainframes: a vendor study.

(part 1)

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Computing...	

...systems are subject to product-specific variations. Most integrated systems are modular in design. A minimal configuration typically incorporates three application components: cataloging, online public catalog access, and circulation control. Of these, the cataloging module--which supports data entry, database management capabilities, and, in some cases, authority control--is required. Circulation...

...such as circulation control or acquisitions. During the late 1970s, several vendors of turnkey circulation control systems--including CLSI and

DataPhase--added online public access catalogs as widely publicized enhancements. The resulting products were often described as library management systems rather than circulation control systems, but their OPAC implementations were primitive...

...were slow to accept them. As late as 1985, for example, only about one-third of CLSI sites had installed that vendor's public access catalog module.

Among other vendors, Data Research Associates implemented its first integrated system for the Cleveland Public Library in 1978, but it had made only three which never incorporated a public access catalog or other expanded functionality, was eventually discontinued; Gaylord did not introduce an integrated library system until the late 1980s. Like CLSI and DataPhase, Geac broadened its original circulation control system to support an online public access catalog, but its initial

configurations employed separate databases for the two operations; the system, while multifunctional, was not truly integrated. Geac subsequently introduced a conventionally integrated...editing capabilities facilitate the modification of headings. Some integrated library systems permit multiple authority files. Several integrated systems support thesaurus-like cross-reference structures that **include** broader **terms**, narrower **terms**, related terms, and scope notes, in addition to the familiar "see" and "see also" entries.

Online Catalog

For many libraries, the implementation of an online public access **catalog** (OPAC) as a substitute for a card or book-form **catalog** is the principal motive for installing an integrated system. The commercial availability of effective OPAC modules signaled the transition from single-purpose circulation control systems...

...OPAC capabilities to their products as optional components. Products introduced since that time, however, have been designed from the outset as integrated systems; their online **catalogs** are essential components rather than optional features. In several cases, integrated library systems have been released in stages, with their online **catalog** modules being introduced prior to circulation control.

Most public access online **catalog** modules are menu-driven, although a command-driven expert mode may also be supported. Menu-driven interfaces are essential for institutions, such as public libraries...

...OPAC modules support the NISO Z39.58 standard, "Common Command Language for Online Interactive Information Retrieval."

Designed for novice users, menu-driven public access online **catalogs** are characteristically straightforward in concept and operation. Search options, identified by abbreviations or numbers, are typically listed in introductory screens for operator selection. Brief instructions...

...help displays that permit lengthy tutorial treatments of specific topics.

While they are easy to use, the menu-driven interfaces associated with online public access **catalog** modules are typically more primitive than those employed by the newest software packages for Macintosh and Windows-based microcomputers. Relatively little use is made of...

...more expensive microcomputer-based workstations with graphic display capabilities.

Interface characteristics aside, specific retrieval capabilities vary from system to system. In the typical public access **catalog** search, a ...one in which a given public access terminal is located. Some integrated systems allow a library to define portions of its holdings-a special collections **catalog**, for example-that can be searched separately.

Emulating the card **catalogs** they are designed to replace, all

online public access **catalog** modules permit searches by author, title, and subject. Addressing a much-discussed limitation of card **catalogs**, most OPAC modules also permit keyword searching of designated fields, particularly titles and subject headings. For maximum flexibility, some integrated systems allow any library-designated...

...In other cases, indexed fields are predetermined by the vendor, but the list is often sufficiently broad to satisfy diverse library requirements.

Some public access **catalog** modules can display all commands entered during a given search session for user review. Root-word searching and Boolean retrieval capabilities are commonplace. In the...

...number. A user can request a more detailed display for all or selected items.

While some early OPAC implementations displayed full bibliographic records in a **catalog** card-image format, most integrated library systems now employ field labels to more clearly identify specific bibliographic data elements. With some integrated systems, display formats

...

...a MARC format display option that includes tags and subfield codes, but that format is more appropriate for technical processing operations than for public access **catalog** searches.

Where no bibliographic records are retrieved by a given search, most OPAC modules display a scrollable, alphabetized list of field values that most closely match the search term. Authority control, when supported by a given system, is typically integrated with the online public access **catalog**. Cross-references are displayed for invalid headings. In some cases, the referenced heading is automatically substituted for the invalid term. If no cross-reference exists...give borrowers access to certain circulation information and functions, thereby reducing staff time spent on borrower inquiries. In a growing number of cases, public access **catalog** users can retrieve their own borrower records by entering a barcode number, telephone number, or other identifier. Borrowers can review the items they have in...

...order or awaiting cataloging. Self-service check-out terminals are supported as a hardware option by several vendors.

Acquisitions and Serials Control

Cataloging, online public **catalog** access, and circulation control are core components of most integrated library systems. As noted

above, those modules are usually included in the basic system configurations...

...may reflect recent improvements in the acquisitions and serials control capabilities supported by integrated library systems. During the early to mid-1980s, cataloging, online public **catalog** access, and circulation control were typically accorded the highest priority for product research and development. Acquisitions and serials control-along with media booking and other...

...book jobbers or other vendors for items to be shipped on approval. Because acquisitions modules are fully integrated with other system components, a library's **catalog** may be searched automatically for duplicate records at the time an item is ordered. Records for ordered items are immediately entered into a library's bibliographic database, and on-order status is usually reflected in the public access **catalog**. Some integrated systems can also maintain a desiderata file.

Purchase orders may be printed in several formats, including forms that conform to the NISO Z39.30 standard, "Ordering Form for Single Titles of Library Materials in issues, and serials holdings information is included in the public access **catalog**. Claiming notices for missing issues may be produced manually or automatically. Some integrated systems can print routing slips for received issues, and pull-slips for items to be sent to the bindery. Typical management and statistical reports include serials **catalogs**, on-order lists, lists of issues received, lists of issues past due, lists of claiming notices sent, and vendor performance reports.

Other Modules
Depending on...

...manage access to equipment (such as video-cassette recorders or overhead projectors) and facilities (such as meeting rooms). Typical management reports and notices include media **catalogs**, reservation workslips and schedules, item schedules, media activity reports, overdue notices, usage summaries.

Other optional application modules will appeal to specific types of libraries. Reserve...

...management capabilities for items placed on reserve by specific instructors for designated courses. Library materials placed on reserve are so designated in the public access **catalog**. Most reserve room modules can also accommodate photocopies and instructors' personal copies for which brief cataloging records are created. Depending on the system, loan periods...

...a widely publicized and highly prized enhancement to their OPAC modules, integrated library systems increasingly provide online access to additional information resources, including the online **catalogs** of other libraries as well as reference sources, such as journal citation databases, obtained from information publishers. These capabilities are typically offered as extra-cost...and Sirsi Corporation have proven particularly popular with special libraries, including government libraries. Innovative Interfaces is the leading supplier of minicomputer-based integrated systems to law school libraries, law firms, and other legal organizations. Integrated systems from Advanced Computer Concepts and Georgetown University were developed specifically for health science libraries.

COMPETITIVE CONSIDERATIONS

In recent...

...offerings of different integrated system vendors share many operating characteristics and features. This is particularly the case with the core application modules--cataloging, online public **catalog** access, and circulation control--that are implemented at all or most customer sites. Fully integrated product designs routinely employ a single bibliographic database to support...impact of microcomputer-based software packages on the integrated system market. Once limited to specific library tasks, such as circulation control or the printing of **catalog** cards, microcomputer-based library automation programs have improved dramatically, in both scope and functionality, since the late 1980s. Fully integrated products that support cataloging, a public access **catalog**, circulation control, acquisitions, and serials control are now widely available. The best examples offer functional capabilities and operating characteristics that closely resemble their minicomputer- and...

...is specifically intended for school libraries.

The broadening of integrated library systems to incorporate enhanced public services functionality involves the expansion of online public access **catalogs** to incorporate external information resources. Since the mid-1980s, integrated system vendors have offered gateway access to the **catalogs** of other libraries. In such cases, an opening OPAC menu lists the external **catalogs** with which connections can be established. The simplest implementations involve connections between the identical systems of a given vendor. Two libraries in a particular locality may have installed the same integrated system. The **catalog** of each

library can appear as a menu selection in the OPAC module of the other institution, thereby giving library users convenient access to information about the holdings in both locations.

When the interconnected systems are identical, the same search procedures can be applied to both **catalogs**. More complicated retrieval scenarios arise when gateway connections involve the integrated systems of different vendors. Until recently, users had to be familiar with the search...

...server. While the Z39.50 standard is sufficiently broad in scope to encompass nonbibliographic information and nonlibrary applications, its initial implementations apply to public access **catalogs** and reference database. A growing number of integrated system vendors offer software to implement Z39.50 capabilities at the client and/or server levels.

Integrated...

...implemented approach involves the installation of one or more reference databases on the same computer used for a library's integrated system software and online **catalog**. Such reference databases are said to be locally mounted. They are typically listed as a user-selectable option in the OPAC module's opening menu...at customer sites. When searching locally mounted reference databases, integrated system users employ the same retrieval commands and procedures supported by the library's online **catalog**. The selection of reference databases available for local mounting varies with the licensing arrangements made by particular integrated system vendors. Databases from EBSCO, H.W...enhanced version. In 1978, DRA developed and implemented a fully integrated library automation system for the Cleveland Public Library. The system--which supported cataloging, online **catalog** access, circulation control, acquisitions, and serials management--was subsequently offered to other libraries as A Total Library Automation System (ATLAS). During the 1980s, the names...

...access, circulation, acquisitions, serials control, reserve room, media booking, journal citations, information and referral, report writer, and full-text retrieval. DRA also offers a COM **catalog** component and a newspaper indexing module.

The DRA cataloging module, which was introduced in 1979 and last revised in 1992, provides data entry and bibliographic...Open DRANET can be downloaded into local DRA systems. If the computer configuration includes appropriate video monitors, diacritics can be displayed.

DRA's public access **catalog** module was introduced in 1979 and has been enhanced substantially since that time. It supports menu- and

command-driven retrieval modes, index browsing, and keyword...addition to the familiar quintet of cataloging, public catalog access, circulation control, acquisitions, and serials control, it offers materials booking, information and referral, a COM **catalog**, full-text retrieval, and newspaper indexing. An imaging module has also been announced.

Data Research Associates is a successful, financially stable company with excellent management...avoid the substantial fixed costs associated with magnetic tape subscriptions. In either case, database searches employ the same commands utilized by the DRA public access **catalog** module. In 1993, DRA implemented test sites for the first phase of the Information Access Center, a full-text database and image retrieval service developed ...run under the OS/2 operating system. The server component employs the Sybase SQL Server database management system. A version of the Marquis public access **catalog** is available for Microsoft Windows.

Classic Dynix software runs on computers that support the PICK operating system, which incorporates a relational database management system as...

...support online terminals appropriate to the particular central processor in use at a given site. In addition, Dynix offers various terminals for specific purposes. For **catalog** searches, Dynix OPAC terminals are available as conventional terminals or as microcomputer-based retrieval stations. They feature labeled, color-coded function keys that initiate basic...

...although some application modules, such as serials control, were introduced at a later date. A fully configured Dynix implementation includes application modules for cataloging, public **catalog** access, circulation control, acquisitions, serials, reserve room capability, media booking, information and referral, homebound access, and journal citations, plus report generation and electronic mail capabilities...supports the creation, editing, and maintenance of bibliographic and authority records. As with other integrated systems, a Dynix bibliographic database contains one record for each **catalog** entry. Bibliographic records are linked to holdings records that contain information about individual copies. Holdings records include various acquisitions and circulation data, including loan period...

...subject bibliographies, and daily or monthly cataloging statistics. The cataloging module can also print spine and pocket labels in several formats.

The Dynix public access **catalog** module makes extensive and

effective use of menus and prompts to guide uninstructed searchers through

retrieval operations. For experienced users, a shortcut mode employs commands to bypass menus. In consortium or multibranch installations, **catalog** searches can be restricted to items owned by the library in which a given public access terminal is installed, items owned by designated libraries, or...

...command will execute the most recently entered search command on system-wide holdings, eliminating the need to retype the retrieval strategy.

The Dynix public access **catalog** module supports a convenient and powerful repertoire of retrieval capabilities. Any field in bibliographic records can be indexed for retrieval purposes. For public access, the...

...list of all indexed words beginning with the specified character string.

Left-truncation of terms can be used to limit searches. If a retrieval specification **includes** multiple search **terms**, a Boolean AND operation is assumed. To initiate a Boolean OR operation, multiple search terms can be enclosed in parentheses, but it unlikely that uninstructed...

...author, subject, and series. A search tracking option generates information about the number and types of searches performed in a given Dynix installation.

If a **catalog** search retrieves a single bibliographic record, it is displayed ...specify additional fields to be included. Records can be added to a previously saved bibliography.

Dynix has steadily expanded the scope of its public access **catalog** module by incorporating additional information resources. The American Heritage II dictionary, for example, is available online. A library can create reading lists or lists of...

...online access to the contents of periodicals and scholarly journals using the same terminals, search commands, and retrieval capabilities employed by the Dynix public access **catalog**. Installed at several test sites in 1993, Dynix journal citation software can load bibliographic records produced by various publishers and information providers, including Information Access...

...college registrar's office on magnetic tape. Authorized staff members can retrieve borrower records by barcode number, borrower identification number, or borrower surname. Public access **catalog** users can retrieve their own borrower records by entering a barcode number and telephone number. Borrowers can review the items they have in circulation, items...control module. A convenient batch reservation capability is

provided for repeat requests. The media scheduling module can generate a variety of printed products, including media **catalogs**, reservation workslips and schedules, item schedules, media activity reports, usage counts and summaries, overdue reports, and equipment service schedules. The Dynix acquisitions module supports online...

...placed on items that are on order. Default information, based on particular order types, can be used to minimize key-entry requirements during order preparation.

Purchase orders can be printed or generated electronically in the BISAC format. BISAC transmission requires a microcomputer-based workstation. BISAC records are downloaded from the Dynix system...

...notices is library-defined. Query notices, rather than claims, are produced for irregular publications. The Dynix serials module can generate many printed reports, including serials **catalogs**, order lists, lists of serials received, lists of items past due, lists of claim notices, and vendor performance reports.

The Dynix homebound module supports the...Marquis. Compared to Classic Dynix, the Marquis system does not currently support as diverse a group of application modules. The five core modules--cataloging, public **catalog** access, circulation control, acquisitions, and serials control--are provided. Absent components--including reserve room capabilities, media booking, information and referral, and homebound access--are of...

...ADA-compliant workstations.

Classic Dynix supports a broader range of application modules than some competing products. In addition to the familiar combination of cataloging, public **catalog** access, circulation control, acquisitions, and serials, a fully configured system can incorporate reserve room capability, media booking, information and referral, homebound access, journal citation databases...

...printed notices, and an interactive messaging capability that can provide information to library users on a 24-hour basis. Classic Dynix supports the Kid's **Catalog**, a graphical **catalog** search program that was developed by CARL Corporation in partnership with the Denver Public Library. The homebound access module, which has few counterparts among other integrated library systems, promotes the development of outreach services. Anticipating library demands for multimedia augmentation of public access **catalogs**, Dynix recently announced an imaging module that can display graphic images and animated sequences accompanied by audio information. The acquisition by Ameritech, a multibillion dollar...

...new capabilities as well refinements to existing system components.

Classic Dynix provides several methods of accessing other information resources from a library's public access **catalog** terminals. As described above, an optional journal citation module permits local mounting of reference databases on a Classic Dynix system. Alternatively, OPAC terminals can access...

...associated with specific CD-ROM retrieval software.

A Classic Dynix system can be set up to provide gateway access to other computer systems, including the **catalogs** of other libraries and online information services. The Dynix system will automatically establish a connection when a particular external computer is selected from a gateway...comparable to that of GALAXY. The ARIES system is designed for consortium installations. It supports partitioned bibliographic databases, while providing online access to a union **catalog** for resource sharing purposes. Cataloging can be performed centrally or by individual libraries. Consortium participants have individual control over operating policies and procedures. Statistics and...

...displayed information, and a voice synthesizer. Gaylord also offers clear braille keycap covers.

SYSTEM DESCRIPTION

The GALAXY system includes application modules for cataloging, online public **catalog** access, circulation control, acquisitions, serials control, reserve book room capability, and report generation. Gaylord initially configures and tailors the GALAXY system to each customer's...in

a split-screen format with differences between them highlighted.

The GALAXY cataloging module can print edit sheets, spine and pocket labels, shelflist cards, complete **catalog** card sets, or lists of newly cataloged items. Card and label specifications can be defined and modified locally.

An authority control module implements standard forms...

...provides global-change capabilities for convenient modification of previously established headings, and masks blind references to headings that are not present in a library's **catalog**.

The GALAXY public access **catalog** module serves as an online union **catalog** for all libraries participating in a GALAXY installation. At the library's option, any field can be declared searchable within MARC records. The public access **catalog** is initially configured to search the most commonly used fields.

In its default search mode, the public access **catalog** is menu-driven. It guides the user through a series of screens that contain prompts and instructions. Context-sensitive help screens can be accessed by

...

...Online Interactive Information Retrieval."

In the menu-driven mode, bibliographic records can be retrieved by author, title, or subject, in the manner of conventional card catalogs. Keyword searches can be based on exact matches within any part of an author's name, title, or subject heading. Alternatively, truncation and wildcard characters can be included in search terms, but novice users or occasional searchers are unlikely to employ such features. A Boolean AND operation is implied when multiple keywords are separated by spaces...

...of author and subject headings is initially displayed for operator selection. Because holdings information and circulation data are integrated with cataloging records, the public access catalog indicates the status (on shelf, due date, or unavailable) of all copies of a given title at all locations within a GALAXY installation.

By employing...

...lost, withdrawn, or otherwise unavailable. While such records are not actually deleted from the library's database, they cannot be retrieved through the public access catalog module. The GALAXY system can generate statistics for various types of catalog retrieval activity, including the total number of searches, the number of keyword and advanced searches, the number of exact or partial matches, the search hit ratio, and the number of searches that failed to retrieve records.

The public access catalog module includes a ...is captured on a hard-disk drive or diskettes for later transfer to the GALAXY system.

Virtually all GALAXY installations employ the cataloging, public access catalog, and circulation control modules. In early 1994, however, acquisitions capability had been implemented at fewer than 10 percent of GALAXY sites. The GALAXY acquisitions module...

...end, or unexpected amounts transferred to the next year. Warnings are issued when orders are placed against overencumbered or overexpended funds.

Multiple items within a purchase order can be received individually or in batches. Line items can be pulled from multiple purchase orders to create an invoice. Items from a given purchase order can be charged to different funds.

Miscellaneous charges can be added when invoices are created. Program safeguards minimize the likelihood of double invoicing for an ordered item.

The acquisitions module can generate a variety of printed notices, reports, and other documents, including purchase orders, claims for unreceived items, cancellations, order status reports, invoice status reports, fund balance reports, and vendor lists. Electronic order records can be submitted to Baker...GALAXY installation.

The GALAXY Supercite module provides online access to indexing and abstracting databases using the same retrieval procedures employed by the GALAXY public access **catalog** module. Journal citations obtained on magnetic tape from database publishers can be loaded into the GALAXY system. Information sources that have been tested for compatibility...

...Gaylord's SuperNET series of connectivity products. Among other SuperNET offerings, Gaylord's SuperSHARE product can integrate GALAXY into a campus communications network, providing online **catalog** access from academic buildings, dormitories, and other locations. Gaylord's SuperCOMM product can establish dial-up connections with external databases, including the **catalogs** of other libraries. It also gives other libraries access to a GALAXY database. Gaylord's SuperLINK product employs the Z39.50 standard to connect GALAXY...widely installed products of its type, it has been utilized by several hundred libraries, including some that employ another vendor's integrated system for online **catalog** access and circulation control. In the early 1990s, INNOVACQ was marketed by CLSI for acquisitions and serials control in its LIBS 100 installations. In the mid-1980s, Innovative Interfaces broadened its product line with the introduction of INNOPAC, a fully integrated system that supports online **catalog** access, circulation control, acquisitions, serials management, and other capabilities. INNOPAC is the subject of this discussion.

Innovative Interfaces is a privately held company with approximately

...

...NISO Z39.47 standard, "Extended Latin Alphabet Coded Character Set for Bibliographic Use." Innovative Interfaces also offers a CJK capability for libraries that want to **catalog** Chinese, Japanese, and Korean works in vernacular scripts. Implementation of that capability involves the addition of CJK software to the INNOPAC cataloging module. CJK cataloging

...

...its normal size.

SYSTEM DESCRIPTION

Like most integrated library systems, INNOPAC is modular in design. Application subsystems are available for cataloging and database management, public **catalog** access, circulation control, acquisitions, serials control, reserve room management, inventory management, materials booking, and electronic imaging.

As an integrated system, INNOPAC employs a single database...

characters to which they apply; otherwise an ASCII character is substituted for diacritics. The INNOPAC CJK workstation, described above, can be used

for public access **catalog** searches as well as cataloging.

Cataloging records and other database components can be created and updated in several ways. INNOPAC provides convenient facilities for direct

...

...the first time, or duplicate call numbers. These and other possible error conditions are listed in printed reports for staff attention.

INNOPAC's public access **catalog** module is menu-driven. Straightforward in presentation, it is well suited to uninstructed users, who should be able to satisfy their **catalog** access requirements with little or no difficulty. An introductory screen lists available retrieval options for operator selection. Subsequent screens include instructions pertinent to specific types of **catalog** searches, together with examples that illustrate search procedures. A subject search screen, for instance, includes examples of single-term and multiword subject headings. A library can specify the content of instructions and examples to be included in particular screens.

Within each public access **catalog** screen, menu options are identified by single-letter mnemonic abbreviations; the letter "A" initiates an author search, for example. Search operations are initiated as soon...

...the selection with the ENTER or SEND key. By avoiding the use of function keys or specially labeled keyboards, Innovative Interfaces allows its public access **catalog** module to be searched from conventional terminals and microcomputers located in offices or homes. As with other menu-driven retrieval products, INNOPAC's retrieval procedures, while very easy to use, may seem tedious to experienced searchers; unlike the public access **catalog** modules included in some other integrated systems, a command-driven "expert" mode is not provided.

While its information retrieval capabilities are not as complex as those offered by some other integrated systems discussed in this issue, INNOPAC's varied and highly usable repertoire of search commands should successfully accommodate most **catalog** access requirements. **Catalog** records can be retrieved by author, title, subject headings, or keywords in any field. Subject terms are automatically searched within all heading subdivisions. Cross-references are fully integrated within the online **catalog**; INNOPAC will automatically substitute the approved term for an invalid heading when a "see" reference is encountered. As a convenient feature, a title or subject...

...an unusual and attractive capability, INNOPAC automatically searches for variant spellings of search terms; thus, a keyword search for the term "labor" will also retrieve **catalog** records that contain the variant form "labour." Boolean operations are supported for title and keyword searches. The Boolean AND operator is implicit for multikeyword searches...

...and call number. A user can select any numbered record for a full display, or enter limiting parameters of the type described above.

Among other **catalog** display options, a MARC-format display includes tags, indicators, subfield codes, and encoded diacritics, as well as data, such as Library of Congress Card Numbers...

...are of limited interest to most users. A library staff display format includes additional acquisitions-related information. A library can suppress the display of any **catalog** record in order, for example, to omit personal copies ...journals acquired for staff use only.

Although Innovative Interfaces does not offer a separate community information or information and referral module, an INNOPAC public access **catalog** can incorporate screens that contain bulletin board-type information. Public access **catalog** users can enter messages or suggestions for review by librarians.

INNOPAC's flexible circulation control module can accommodate a broad range of local requirements as...

...the charge-out function, brief bibliographic records can be entered for items not in the library's database. Circulation transactions are automatically blocked when exceptional **conditions** are encountered. Examples **include** a borrower with an excessive number of items charged out, an excessive number of items overdue, or an excessive amount of fines owed. Threshold values...

...that all parts of an item are present. An authorized operator can backdate check-in transactions. For recently returned items, the circulation status field within **catalog** records can contain a special message for a specified period of time to allow for reshelfing. To maintain the privacy of borrowers, charge-out records...

...that certain types of borrower cannot place holds on certain types of items. The number of holds associated with a given title is indicated in **catalog** records. The system will issue a purchase alert when the hold queue for a title exceeds a library-specified size. Holds can be placed on...

...charged but at any circulation terminal, and reserve and nonreserve

items can be intermingled in a given circulation transaction. Through the on-line public access **catalog** module, course records can be retrieved by course identifier, instructor, or other library-specified fields. Reserve status is indicated in **catalog** records. The system can print reserve lists by course or instructor.

Innovative Interfaces offers a standalone, microcomputer-based backup program to collect information about charges...

...from book jobbers or other vendors for items to be shipped on approval.

On entry, INNOPAC will check for duplicate items in the library's **catalog** and on-order file. INNOPAC performs currency conversions at the time an order is placed and when it is paid.

INNOPAC prints **purchase orders** on three-by-five-inch slips intended for insertion into a window envelope. **Purchase orders** are printed in duplicate; one of the copies is to be returned with the item. Receiving procedures are straightforward. The library key-enters order numbers **purchase orders**, INNOPAC can transmit orders to vendors electronically in the BISAC format via INNONET, which is a subnet of the TYMNET network. INNOPAC can also receive...

...monitors items for arrival within library-specified time periods and will issue claims accordingly. In addition, claims can be initiated manually at any time. Like **purchase orders**, claiming notices are printed in duplicate on three-by-five-inch slips for insertion into window envelopes. The vendor can return one copy as a...

...be bound. It can also print binding slips and will track issues that have been sent to the bindery, noting that status in the online **catalog**. Summary holdings statements are automatically updated when issues are returned from the bindery.

INNOPAC's materials booking module accepts reservations for library materials, equipment, and facilities for specific times in the future. Booked items can be included in or omitted from the public access **catalog**, at the library's option. Booking can be made for any time period or duration. Groups of items, such as a room and an overhead...

...to other libraries and notices to borrowers who participate in another electronic mail system.

INNOPAC's electronic gateway module provides transparent connections to public access **catalogs** installed in other libraries. Gateway access is listed as a selection in INNOPAC's opening menu. A subsequent display indicates available libraries. As an option...

...use Innovative's systems for acquisitions and serials control only. Many of those libraries' installations employ the integrated systems of other vendors for cataloging, online **catalog** access, and circulation control. The following discussion of INNOPAC's installation characteristics

is based on the approximately 290 libraries that have implemented the INNOPAC public access **catalog** module. While several libraries have implemented the OPAC module alone, most employ at least one additional INNOPAC application module. Approximately 210 libraries have installed the four basic INNOPAC components: public **catalog** access, circulation control, acquisitions, and serials control.

About 90 percent of INNOPAC systems are operated by U.S. libraries.

Innovative Interfaces has installed INNOPAC in...

...and Zink (1991). More than 70 INNOPAC installations are accessible via the Internet. Examples, with telnet addresses, include Boston University (library.bu.edu), Columbia University Law Library (pegasus.law.columbia.edu), New York Public Library (149.123.101.18), National Taiwan University (140.112.196.20), the ...University of Arizona (sabio.arizona.edu).

Approximately 77 percent of INNOPAC installations are in academic libraries. Special libraries--including government libraries, hospital libraries, and county law libraries--account for 12 percent of the installed base, but INNOPAC's academic library installations include many law school and medical school libraries that might be categorized as "special libraries." Since the mid-1980s, Innovative Interfaces has enjoyed particularly strong sales to law school libraries. Its customer list includes more than 50 such libraries as INNOPAC and INNOVACQ sites. Public libraries account for 10 percent of INNOPAC installations...

...this issue, only NOTIS has a higher concentration of its customer base in the academic library sector. INNOPAC has excellent market strength among special libraries. Law libraries, as previously noted, are a particularly large component of its customer base.

A number of INNOPAC systems have been purchased as replacements for previously...

...1 implementation of its integrated library system.

A typical INNOPAC configuration supports the familiar quintet of application modules associated with integrated library systems: cataloging, public **catalog** access, circulation control, acquisitions, and serials control. Intelligently conceived and attractively implemented, these application modules provide an effective repertoire of basic capabilities and special features...
...and very flexible. INNOPAC offers particularly strong acquisitions and serials control capabilities. With other systems, those modules have historically received less developmental attention than public **catalog** access and circulation control. The excellence of INNOPAC's

acquisitions and serials control modules is reflected in their high rate of adoption. Acquisitions and serials...separate field within MARC records; alternatively, they can be stored in a separate database. Image viewing is offered as a menu option during public access **catalog** searches.

Innovative Interfaces offers flexible approaches to the implementation of reference databases in INNOPAC installations. Innovative Interfaces provides fully operational, commercially available software for Z39...1994.

SYSTEM DESCRIPTION
In each of the three configurations outlined above, NOTIS includes application modules for bibliographic and authority control (cataloging), an online public access **catalog**, circulation control, acquisitions, serials control, and access to reference databases. NOTIS also incorporates database management and report generation capabilities appropriate to its application modules. The...

...of new or deleted headings, and error reports for specific conditions, such as headings; in conflict with authority records. Other printed products include catalogers' workforms, **catalog** card sets, and spine labels.

The NOTIS public access **catalog** module supports menu- and command-driven interfaces. The latter conforms to specifications outlined in the 2.39.58 standard, "Common Command Language for Online Interactive...

...to 99 screens, thereby permitting tutorial treatments of specific topics. As an attractive feature for consortium or multibranch installations, a library can define multiple online **catalogs** by location, type of material, or other parameters.

The public access **catalog** module supports searches by personal, corporate, and conference names; titles, including uniform titles and alternate titles; series titles; subject headings; and call numbers. If desired...

...paragraph). Automatic right-truncation of search terms is a standard feature. The characteristics and utility of specific retrieval capabilities supported by the NOTIS public access **catalog** module are discussed by Christensen et al. (1989), Ensor (1992, 1992a, 1992b), and Turner (1992), among others.

NOTIS responds to search statements with an index or guide screen that includes cross-references. Earlier releases displayed bibliographic

records in a **catalog** card format; since 1990, however, NOTIS has relied on labeled fields with displayed data values in short and long record formats. The content and appearance...
...data and item status information.

The NOTIS circulation control module is fully integrated with other system components. Changes in circulation status are immediately reflected in **catalog** record displays. For materials returned from circulation, a library can define a time period that reflects the typical delay between the discharging of an item and its reshelfing; during that interval, **catalog** records display a "returned" message and the discharge date. Longer intervals can be defined for items returned to other branches. Most NOTIS installations rely on...automatic currency conversion based on library-specified exchange rates. All ordering activity and financial transactions are updated in real-time and are immediately reflected in **catalog** records. As with circulation control, the acquisitions module is highly parameterized. Each technical processing unit can define default operating conditions for fund structures, action intervals for procurement transactions, codes for most frequently used funds, and fiscal closing periods.

Acquisitions capabilities are fully integrated with the cataloging and **catalog** access modules. Order records are linked to bibliographic, holdings, and items records. **Catalog** searches will indicate the current status of items at various stages in the procurement cycle, including pre-order, on order, and received but awaiting processing.

The NOTIS acquisitions module can generate a variety of printed products, including **purchase orders**, claims and cancellation notices, return notices, vouchers, and credit requests. Predefined message codes are used to specify the text to be included in particular documents

...

...history for past issues. Holdings information is automatically updated in real-time as individual issues are received. Receipt of new issues is immediately reflected in **catalog** records for particular serial titles. Serials holdings data can be displayed in a variety of formats. At the library's option, **catalog** records can also display the anticipated receipt date for the next issue.

The serials control module generates various reports that will enable supervisors to make...

...items owned by the library. Databases available for use with MDAS include Agricola, BIOSIS, Books in Print, CINAHL, Compendex Plus, Current

Contents, ERIC, GPO Monthly **Catalog**, Health Planning and Administration, Mathsci, MEDLINE, PSYCINFO, and various indexes produced by Information Access Company, University Microfilms International, and H.W. Wilson. MDAS can also accommodate locally produced databases, such as course **catalogs** and campus ...standard. PACLink is a client/server application that provides Z39.50 compatibility between a NOTIS system and compliant information servers. Users can search remote online **catalogs** and other information services via the same commands and procedures employed in a library's own NOTIS installation. At the University of California-Santa Barbara, its initial site, PACLink establishes a connection between NOTIS terminals and MELVYL, the online union **catalog** for nine California campuses. Prior to the installation of PACLink, the library employed separate terminals to access NOTIS and MELVYL. TermPAC is a character-based...

...significant modifications in their work routines. With NOTIS, a multicomponent library system can define distinct processing units for autonomous technical processing departments operated by general, law , medical, or science branches. Each unit can specify access privileges, authority control procedures, and other characteristics for its own records.

The NOTIS public access **catalog** module is well suited to the diverse clienteles encountered in universities and other large organizations. As with some other systems discussed in this issue, menu... parameterized, fully integrated, and based on open system concepts. The Unicorn system, Sirsils initial product, was introduced in 1982. It included application modules for cataloging, **catalog** access, circulation control, and a reserve book room. A turnkey implementation became available the following year. Acquisitions and serials control modules were added in 1985...control for headings in library-specified fields. The system's authority control capability adheres to the ANSI Z39.19 standard. It operates interactively. As new **catalog** records are entered, headings in designated fields are checked against an authority file. If a heading exists in the authority file, no action is taken... ...Authority records and their associated cross-references can also be key-entered and edited online. The Unicorn system supports global changes of authority records.

Online **catalog** access is obtained through Unicorn's Enhanced Public Access Module, which supports a flexible group of retrieval capabilities. In its standard mode, the module is...

...headings that are displayed within a given bibliographic record. Thus, an author heading can be selected to retrieve other works by that author.

If a **catalog** search retrieves a single bibliographic record, it is displayed with fields clearly labeled. The library specifies the fields to be included in full record displays...

...for repeated execution. Retrieved records can be captured for review or manipulation by other programs. Retrieval profiles can define the fields to be displayed when **catalog** records are retrieved by specific library users. In early 1994, Sirsi announced an agreement with CARL Corporation to integrate CARL's Kid's **Catalog** Software with Unicorn's Enhanced Public Access Module. Sirsi also offers a shadow **catalog** feature that allows a library to create and maintain bibliographic records that are accessible only to library staff members. Shadowed records cannot be retrieved at public access terminals. A shadow **catalog** might store professional books, records for items on order, records for items awaiting cataloging, and records for missing or withdrawal items. When used in combination with the Unicorn reserve module, personal copies or photocopies removed from reserve status for a given semester can be transferred to the shadow **catalog** until they are again placed on reserve.

Unicorn's circulation module ...multiple courses and instructors. Items on reserve can be searched by course name or instructor, in addition to retrieval parameters supported by the public access **catalog** module. Holds can be placed on reserve items. Course lists, instructor lists, and statistical reports can be produced for reserve collections. The Unicorn acquisitions module...

...file can be searched by vendor name, vendor code, or the library's customer number.

The Unicorn report utility, described below, is used to print **purchase orders** from information contained in order, fund, ...serial title to which a library subscribes. Within each record, a field can list received issues; alternatively, issues can be added to the library's **catalog** as individual items. Serial records also contain control information, including the vendor, the number of copies, publication frequency, and a receipt tolerance period. Serial records...

...a library's collection.

Several optional components extend the Unicorn system's information retrieval capabilities to encompass information resources other than a library's own **catalog**. With Sirsi's Multiuser Gateway, OPAC workstations can access external information resources, such as online information services and the **catalogs** of other libraries. The gateway establishes the required connections to remote computers. VT100 emulation is supported. Searches are conducted using the command languages and procedures...Sirsi's Internet Navigator facilitates access to Internet information resources from Unicorn workstations. It provides menu listings of Internet sites, including a menu of library **catalogs** arranged by

country. Sirsi's VIZION product is a general-purpose communications program that provides Z39.50 client compatibility, terminal emulation capabilities, and full telnet...

...from a variety of sources and provides extensive authority control capabilities. Unicorn supports customized bibliographic formats as well as the MARC format. The public access **catalog** module is easy to use, and the BRS Search Engine provides a powerful repertoire of retrieval capabilities. Full-text retrieval can be based on any word in bibliographic records. Special features-such as a shadow **catalog**, electronic marking of retrieved records, full-text storage within bibliographic records, and hypertext search capabilities-have few counterparts in competing products.

Unicorn's circulation control...Unicorn system offers the special cataloging and document accountability features noted above, a reserve room component for academic libraries, an implementation of the Kid's **Catalog** for public and school libraries, a materials booking module, more fully developed capabilities for the implementation of reference databases, and commercially available Z39.50 functionality...

...is an outgrowth of automation activities in an academic library-specifically, the Universite du Quebec a Montreal (UQAM), which had an operational online public access **catalog** as early as 1972. The UQAM system, known as Banques de Donndes a Acces Direct de l'Universite du Quebec (BADADUQ), was implemented on CDC...

...and Cowan and Chaput (1978).

Between 1978 and 1981, BADADUQ was redesigned as a fully integrated library automation system with application modules for cataloging, online **catalog** access, circulation control, acquisitions for both monographic and serial publications, and report generation. The new program, called Systeme Integre de Gestion Informatise des Resources Documentaires...barcode readers, modems, multiplexors, network interface cards, and routers.

SYSTEM DESCRIPTION

A fully configured multiLIS implementation includes application modules for cataloging and authority control, public **catalog** access, circulation control, and acquisitions, as well as report generation capabilities. A serials control module has been installed at beta test sites.

As integrated system...
...same computer or on separate computers in a networked configuration. Security features prevent unauthorized access to specific system capabilities. With the exception of the public **catalog** component, access to multiLIS application modules is controlled by user numbers and

passwords. Specific terminals can also be limited to designated functions, such as cataloging...

...record to another. The multiLIS system's own record editing module does not support this capability. The cataloging module can produce various printed documents, including **catalog** card sets, book-form **catalogs**, and spine labels.

The multiLIS cataloging module incorporates authority control for personal and corporate names, series, uniform titles, subject headings, publishers, and media types. As...records, any of which can be utilized by a participating library as its accepted form. An authority file is displayable as an online thesaurus that **includes** related **terms**, broader **terms**, narrower terms, and scope notes for individual entries. Global editing capabilities facilitate maintenance of authority records. In addition to checking headings against authorized forms, the...

...with ISBD requirements, and checks call numbers and ISBN numbers for possible data entry errors or duplication.

Designed for novice users, the multiLIS public access **catalog** module is menu-driven, relies on defined function keys to initiate search operations, and includes help screens with examples. A command-driven mode is provided...

...of publication, library location, and format. Root-word searching (right-term truncation) and Boolean operators (AND, OR, and NOT) are supported. If a search command **includes** multiple **terms**, the AND operator is implicit. With the exception of name searches, the order of terms is irrelevant. Previously entered search statements can be displayed for review.

Authority control is fully integrated with the public access **catalog**. Cross-references are displayed for user selection without rekeying. Users can request an explanatory display of authority information for specific headings. The explanation includes a...

...library's holdings and subsequently broadened to include all bibliographic records. In consortium installations, individual libraries can specify the types of permissible searches. Public access **catalog** displays can be limited to the holdings of specific libraries in a consortium installation. Individual libraries can specify brief or full formats for record displays...

...search results.

The multiLIS circulation control module is fully integrated with other application modules. The circulation status of items is displayed in the public access **catalog**. Circulation activities are defined by

policy parameters that are based on borrower and item types. The multilIS system permits up to 255 borrower and item...

...due dates for items previously checked out, items for which holds have been requested, and fines owing. Borrowers can also place holds on items during **catalog** searches. Sobeco Ernst & Young has received requests from several clients to integrate the 3M self-checkout terminal into multilIS configurations, but that device is not...from performance in previous procurement transactions. Exchange rates are automatically calculated from library-defined amounts, and encumbrances are automatically adjusted to reflect newly entered rates. **Purchase orders**, claiming notices, and other documents can be printed immediately or in the batch mode. **Purchase orders** can be transmitted electronically in the BISAC format. Sobeco currently supports an online ordering system with Bookhouse. It plans to develop similar arrangements for Faxon...is installed at one site; alternatively, a distributed processing configuration can maintain local databases at specified sites, thereby reducing network traffic.

The multilIS public access **catalog** is intelligently designed and well suited to uninstructed users. An improved menu-driven interface with windowing capabilities is in development, but the current implementation is quite good. It permits Boolean searches and effectively integrates the system's authority control capabilities for display of cross-references during **catalog** searches. In addition to authors, subject headings, and uniform titles, multilIS authority control can be applied to fields for publisher, series, and document type. The public access **catalog** lacks proximity search commands, but that feature is seldom required by the public and college libraries that are the majority of multilIS customers. The multilIS...

...a joint undertaking with Arthur Andersen & Company. The project will give Minitel users access to multilIS systems installed in local libraries, allowing them to perform **catalog** searches, place holds on library materials, and review their own borrower records. Sobeco Ernst & Young will soon begin testing a Z39.50 server. The company...university had examined commercially available library automation systems but rejected them as unacceptable. The customized system, which combined circulation control with an online public access **catalog**, was installed in late 1975. Originally known as the Circulation and Finding System (CFS), it provided the foundation for today's fully integrated VTLS system...

...and Lee (1989), and Nicol (1991). The VTLS system is modular in design. The basic system includes application subsystems for cataloging, authority

control, online public **catalog** access, keyword and Boolean searching, circulation control, reserve room capability, serials control, and report production. Of these, only the cataloging component is essential, although more than 85 percent of VTLS installations have also implemented the online public access **catalog** and circulation control. Additional software components support acquisitions, journal indexing, and document delivery. Electronic messaging software supported by Hewlett-Packard and IBM computers can be...browsing of authority files, global editing of authority records, and merging of headings. Cross-references are accessible online and fully integrated with the public **access catalog**. Authority records can include references to broader and narrower terms. Headings selected from an authority file can be pasted into bibliographic records. As an optional...

...MARC tags. Records entered or edited through the cataloging client are uploaded to the VTLS system by pressing a function key.

The VTLS public access **catalog** module offers a choice of menu- or command-driven interfaces. Both are easy to use, and an operator can alternate between the two interfaces. The menus, which resemble their counterparts in other public access **catalog** programs, list available fields and search options for operator selection. Effectively designed for novice users, the VTLS menu screens contain instructions and examples of searches...

...customize the format and content of bibliographic, item, and menu displays. Libraries also can specify the text contained in help screens.

The VTLS public access **catalog** module supports keyword and Boolean searches as an optional capability. The keyword and Boolean module is compatible with both menu- and command-driven OPAC modes...

...a Boolean or truncated keyword search.

VTLS offers three microcomputer-based products—the VTLS Intelligent Workstation, VTLS EasyPac, and the VTLS InfoStation—that can facilitate **catalog** searches, particularly for users who are unfamiliar with VTLS search procedures. Designed for IBM-compatible microcomputers running under the MS-DOS operating system, the VTLS Intelligent Workstation (VTLS-IW) provides a Windows-type interface to the VTLS public access **catalog**. VTLS EasyPac provides similar capabilities for IBM-compatible microcomputers equipped with Microsoft Windows. Both products support pop-up menus and mouse operations. The VTLS-IW...

...IS) is described by Lee (1990, 1991). Operating under the NEXTSTEP

operating system, it provides a microcomputerbased graphical user interface to the VTLS public access **catalog** as well as external databases. Icons are used to select databases to be searched, download records, and initiate other operations. Among its special features, the...to bibliographic records, vendor records, and account records. An order can be charged to multiple accounts.

Acquisitions information can be included in the public access **catalog**. Bibliographic records transferred to the acquisitions and fund accounting component can be assigned a status of "to be ordered." That status is changed to "on order" when a **purchase order** is generated. Canceled and received items are also noted. The system allows partial receipts. When receipt information is entered, order records are automatically updated. Workforms...

...automatically generated for items that have not arrived by an expected date. Subscription orders include an expiration date that is used to generate renewal alerts. **Purchase orders** can be printed or generated electronically in the BISAC format. VTLS supports a number of preformatted acquisitions reports, including account summaries, account details, audit trails...

...is supported for irregular serials, supplements, and special issues. A single command, entered from the MARC bibliographic screen, creates a brief holdings record. Public access **catalog** displays list the library's complete holdings for a given serial title, with gaps noted. Location and format information is provided for multiple copies. The public access **catalog** can indicate which issues are at the bindery or missing.

The VTLS journal indexing subsystem permits cataloging of the contents of library materials, such as...

...or call number screen. Users can display a menu of articles in a given periodical issue or the chapters of a book. The public access **catalog** includes symbols that indicate which journals and books have been indexed. The journal indexing subsystem also supports the inclusion of abstracts or full text within...

...for keyword searching.

The VTLS document delivery subsystem facilitates the circulation of materials from closed-stack collections. Requests for items can be entered online during **catalog** searches. The requests are then paged by library staff and brought to designated pickup locations. The subsystem can also be used for online entry of...

...including H.W. Wilson, Information Access Company, and University Microfilms International. The databases are indexed in the VTLS format for searching through the public access **catalog**. In 1993, VTLS introduced client software for Z39.50 communication capabilities. VTLS Z39.50 client software runs on Windows-based microcomputers. It relies on icons...operations. The VTLS cataloging module can accept machine-readable input from a variety of sources. Effective authority control capabilities are provided. The VTLS public access **catalog** module offers a choice of menu- and command-driven modes. The optional keyword and Boolean searching module supports a powerful group of retrieval capabilities. VTLS

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05438376 Supplier Number: 11080382 (THIS IS THE FULL TEXT)
A buyers' guide to software for purchasing. (buyers guide)

Purchasing ,v111 ,n1 ,p77(5)

July 18 ,1991

Text:

American Software. This real-time Purchasing System can be used as a stand-alone, or it can be integrated with materials management systems offered, including inventory control and accounting, requisition management, bid, and accounts payable systems. Provides centralized control for multiple site operations. System supports blanket or other contract types as well as standing, normal, and emergency purchases. Produces change notices and receiving documents. Confirms receipts and returns. Comprehensive vendor, item, and buyer performance reporting. Accommodates entry of free-form notes. Some optional features include AMSOFT Buyer Work station-PC, AMSOFT Dock-to-Stock, AMSOFT Bin Locator, and AMSOFT EDI which delivers EDI transaction sets, management software, network interaction and support services. Purchasing System runs on IBM 390, 370, 30XX, 43XX, AS/400, and System/38. Circle 351

American Tech. P.O. WRITER-Plus is a full-function purchasing system designed for use on the IBM PC/XT, AT, PS/2, or 100% compatible PCs. This system contains 13 modules: purchasing with P.O. create, history, and summary report capabilities); receiving module (with receipt transaction recording/history, and open order status); vendor performance module (with rating of delivery, price, quality, and overall vendor performance); inventory control module with inventory status, usage history, and automatic reorder analysis); and an accounts payable interface module that allows three-way matching of P.O., receipt, and invoice. P.O. WRITERPLUS can be implemented in modules or as a complete system. An optional ad-hoc reporting module is available for custom reports/inquiries and a data interface utility allows upload/download capabilities. In addition, system includes bar code, remote requisitioning, and fax/EDI. Circle 352

Apian Software. Decision Pad brings the graphical and computational power of the IBM PC and compatibles to the familiar weighted criterion analysis method. The criteria-any mix of up to 250 factual and subjective issues-are expressed in plain English so anyone will understand your analysis. Decision Pad has graphical tools to maximize the objectivity of weights and subjective ratings. Notes can be attached to document sources and reasoning. Scores and ranking are always updated instantly for

"what-if" Unknown values are evaluated best and worst case to see if the decision has already been made, or if these questions need to be answered.

Balloting system for multiple evaluators. Import reports fully the document decision and speed approvals. Easy-to-learn "Windows-like" user interface.

LAN support optional. Circle 353

Applied Micro Business Systems. STOCKMASTER 4.0 is a micro-based comprehensive inventory management system with purchasing order writing and tracking capability. **Purchase orders** are monitored on an individual transaction (line item) basis by item number, vendor number, P.O. number, due date, days overdue, manufacturing order number, and/or job number. Also included are vendor performance and procurement support modules, which maintain a database of each supplier for each item and generate user/vendor item cross-reference lists, best leadtime analysis, and best pricing analysis. **Purchase order** writing and tracking functions are fully integrated with STOCK-MASTER 4.0 inventory management system, Circle 354

Armor Systems. Armor Systems offers a comprehensive **Purchase Orders** application as part of its 15-module Premier Accounting Software package. **Purchase orders** allows users to create, change, view, or delete **purchase orders** and their accompanying detail. The **Purchase Orders** module posts all data specified and transfers data to the Inventory Control module. The system will track items and **purchase order** status by department, vendor, or other category. It can also quickly review drop-ship addresses, cash flow, and item status. Additional modules can be fully integrated into **Purchase Orders** including Accounts Receivable, General Ledger, Payroll, Accounts Payable, Order Entry, Billing, Job Cost, and Bank Reconciliation. A report generator is available for custom reports. Also file structure layouts are provided for programmer access to EDI capability. In addition, a screen formatter is available to customize screen presentations. Premier is designed for small and medium-sized single-and multi-location operations. The software operates on IBM Incomnet. PC Quotation Tracking (QTS) Version 3 tracks vendor details and pricing, compares prices, generates RFQs and P.O.s, vendor phone lists, and performance reports, and forecasts costs ahead of time. Eliminates manual quote tracking. The QTS saves time by eliminating repetitive typing, increases accuracy through automatic comparisons. QTS saves money by tracking all quoted prices. It runs on any IBM PC/XT, AT, and PS2 compatible computer, and is designed for small or large companies. Circle

Informs. The Advanced Government Purchasing System (AGPS) is a robust automated purchasing system designed to fill the purchasing needs of large governments (state and large local governments), and their agencies DOTS, universities, utility districts, etc.) AGPS automates the purchasing function, from requisition entry through solicitation and award, and supports all of the major processes of procurement management, particularly facilitating the use of term contracts. AGPS supports a variety of commodity code structures, provides on-line processing, and real-time database maintenance. AGPS is a buyer-driven system. Documents are initiated and moved through the system by a series of status code changes.

AGPS completely supports the procurement cycles unique to governments. Solicitation document production and Preliminary/Final/Amendment order document production are key system features that allow for the use of Standard, and Special, Terms and **Conditions**. The baseline software **includes** numerous management reports, and meets affirmative action and minority reporting requirements. AGPS is IBM mainframe-based and is available for implementation in VASM, DB2, IMS, and ADABAS technical environments. Circle 379

Integrated Systems Inc. The TOPAZ Series is a comprehensive, seamlessly integrated set of software modules that encompasses the procurement cycle-automated production of quotations, electronic **purchase requisitions** with on-line approvals, **purchase orders**, receiving, material requisition and inventory control (stocked items), accounts payable, bar coding, and EDI. For medium to large organization environments that perform functions such as administration, service, distribution, and limited manufacturing. It is a fully-interactive, multi-user multi-location system. Facilitates advanced features such as E-mail and windows to simplify usage. Full audit capability and historical data retention are provided. Inventory processing includes automatic warehouse transfers for stock-outs, full physical inventory subsystem, cycle counting, automatic reorder, and inventory analysis. Several ad-hoc reports and inquiries are standard in each module. Operates on DEC VAX/MICROVAX VMS systems. A full range of consulting and training services are also available. Circle 380

Kehlbeck & Associates. PIC Purchasing Information Center is an on-line, low-cost system that is designed to assist the buyer in making immediate 'smart' purchasing decisions. Programs included within PIC are: Supplier database, **Purchase Orders**, Receiver, Overdue, Expedite, Supplier Directory, Business Cards, Telephone Directory, Cash Flow, Project tracking, etc. Flexible to meet the needs of Government, Service, and Industrial customers. Can be used for purchase of production materials as well as expense, capital equipment and maintenance supplies.

Program can be modified to meet customers' needs. Program runs on IBM PC or compatible. LAN version runs on MS DOS networks. Demo diskette, identical to program, with limited input capability is also available. Circle 381

Lawson. Company's distribution management system includes order entry, **purchase order**, inventory control, accounts receivable and integrates with the Lawson Accounting System. The Lawson **Purchase Order** System provides historical data with information about vendor performance so that buying decisions consistently maximize inventory investment. Users may analyze vendor performance by quality, quantity, cost, and timeliness. The system provides accurate ratings for vendor selection, saving time and eliminating tedious manual calculations. It has an EDI interface file for **purchase orders** and acknowledgements. Functions include standard blanket or template order tracking; flexible unit cost defaulting (quantity breaks, **catalog** pricing, vendor pricing); inspection/rejection processing; substitute item handling; extensive commenting capability; variable decimal place feature for cost, quantity; vendor analysis by quantity, quality, price and delivery performance; and substitute receiving. Operates on IBM mainframe, IBM AS/400, Unisys A and U Series, AIX/UNIX operating systems, Hewlett-Packards's 9000 Series 800 (HP-U Release 7.0) and Digital Equipment Corp.'s DECSystems Series (ULTRIX Release 4.0). Circle 382

Leland-Baan Information Systems. TRITON is a 22-module UNIX-based comprehensive inventory management, manufacturing control, and financial system. The TRITON Purchase Control module includes the automatic calculations of purchase prices on the basis of price lists, calculation of the delivery time, windowing facilities, integration with Accounts Payable and General Ledger, supplier reliability, last price paid, and many other functions. TRITON Purchase Control is used by more than 600 companies worldwide in both standalone mode, and integrated with the other TRITON modules to handle the entire logistics of production companies. Circle 383

LS DataNet Systems Inc. The LS Business and Manufacturing Software is a network-based integrated business system which automates material and personnel management. Use the software to input material requisitions, manage vendors, print and fax quotation requests, generate **purchase orders**, receive items, pay invoices, manage stockrooms, manage assets, retrieve item data from vendor supplied **catalogs**, and track human resource information. Supports PSs, blanket orders, releases, and maintenance contracts. P.O.s may be printed, faxed, or transmitted via EDI.

The software produces many detailed, summary, and analysis reports. Passwords, authorities, and detailed audit trails provide system security.

The software operates on single-user PCs, PC networks, or multi-user 386/486 based PCs. A complete version of the software and documentation is

available for evaluation and testing. Required hardware: PC and laser printer. Optional hardware: PC network, GammaFax fax board, Hayes compatible modem for EDI. Updates with additional features are provided twice a year. Circle 384

Macola. A **purchase order** and receiving package is one of 17 modular, yet integrated, packages offered by this company. The total system consists of nine core accounting packages, eight manufacturing packages, and vertical solutions for distribution, retail, and professional services. System features updated user interface, on-line integrated graphics, enhanced password protection, full screen editing and keyboard macros. Specifically, Macola's **Purchase Order** and Receiving package helps ensure that the correct quantity and quality of material is available when it's required. It requires company's Inventory Management

and Accounts Payable 5.0 packages to be installed and functioning. The package supports three types of **purchase orders** for on-line entry and printing: normal orders, blanket orders and releases against blanket orders. The package will compare the receipt date with the request date and display a warning if the receipt date is earlier than the request date by a margin larger than allowed by company policy. Receivings update the Inventory file's quantity on-hand immediately. In addition, an Audit

Trail record is created to keep track of the transaction. Circle 385

Marcam Data Systems Corp. PRISM is a fully integrated production management and planning tool for process manufacturers. Purchasing is one of the modules in the PRISM system. PRISM is based on resource management

concepts that enable manufacturers to manage materials, labor grades, utilities, and all cost and resource elements of production. A process manufacturer can define all resources essential to an individual plant.

The system enables users to manage yield, by-products, production schedules, substitutes, potency, graded materials, and other manufacturing needs unique to process manufacturers. Other modules include Resource Management,

Resource Processor, Foundation, Customer Order Management, Advanced Costing, Resource Planning, Production Analysis, Financial Support, Accounts Payable, Accounts Receivable, General Ledger, and Query Plus. Circle 386

PBL Associates. Purchasing and management system for Tandem NonStop super minicomputers and mainframes. System tracks commitments related to unper-formed contracts for goods and services as well as expenditures.

System lets you review expenditures and commitments for any project, job, encumbrance account, fund or general ledger account. It lets you limit expenditures to predetermined amounts. On-line system gives buyers real-time analysis and correction capabilities, and allows real-time approval of P.O.s. System handles entire purchasing operation, from the receipt of a requisition to the final payment for a **purchase order**. It maintains standard **purchase order** clauses and item descriptions which you can include on P.O.s. It includes **tax** information, interfaces Accounts Payable system and conforms to EDI standards. Optional three-way match protects against overbilling. Available in NonStop SQL. Circle 387

Phillips Petroleum. Phillips OPTIM Materials Management System provides an integrated mainframe-based package for planning, acquiring, storing, and disposing materials. Modules include a cataloging function for uniquely describing items; an inventory and warehouse function for tracking storage, issues, receipts, order points, accounting, etc.; a procurement function for generating (EDI or printed) and tracking **purchase orders**, supplier information, etc.; and a major equipment function for maintaining bills of material, service history, operating environment, transfers, and cross-referencing for individual items. Circle 388

Purchase Master. Purchase Master on-line system provides information on vendors, products, and past purchases while allowing users to create and print quotations from requisitions with follow-up of quotations and tabular analysis of quotations. Users can also analyze the performance of the purchasing department, purchase agents, and vendors in terms of cost, quality, and time. Circle 389 Purchasing Systems Technologies Inc.

Power 1000 purchasing system uses a 4th generation, multi-user, relational database with features that include variable length and multi-valued fields, and SQL reporting capabilities. Designed to encourage modifications and to integrate other technologies including spreadsheets, other database files, the Thomas Register CD-ROM and Intel Connection CoProcessor Fax board. Circle 390

SATCOM. PSI/3000 is a complete purchasing and materials management system designed to address the unique requirements of MRO environments. Its three integrated modules address requisitioning, request for quotes, **purchase orders** (including blanket, one-time, time and materials, etc.), materials management, and financial control for auditing of the vendor's invoice. Sophisticated replenishment techniques provide for system-generated requisitions and **purchase orders** based on an analysis of usage and demand history, supplier leadtime, and many other key

factors. Circle 391

SDC Software Inc. Purchasing system is a complete system that manages purchasing activities from request for quotations through receiving. The system integrates with Mapics I/II, SDC Standard Inventory System, SDC Maintenance Scheduling System, other Inventory Systems. or may be used in a stand-alone environment. The system supports multiple companies and warehouses. It also maintains unlimited vendors, items and price quotations. The software includes integrated code lookups, a vendor name search, and multiple access paths for item and **purchase order** searches. The output of the system includes **purchase orders**, receiving reports, purchase commitments, expediting reports, open-order reports, and request for quotations. Other features include the ability to enter multiple general ledger account numbers and percentages for individual items on a P.O., the ability to purchase non-stock items, and the ability to purchase items for a specific job or piece of equipment. Complete purchasing and receiving history is maintained on-line for unlimited time periods. Custom modifications are available on request. Designed for the IBM S/36 and AS/400 platforms. Source code included with system. Hotline support provided in package price at no charge. Circle 392

Software International Corp. Masterpiece **Purchase Order** is an on-line, interactive purchasing system optimized for the order processing function. Major functions include vendor performance; on-line inquiry; extensive reporting; P.O. processing; on-line P.O. printing, receipts, and inspection; and invoice entry and matching against P.O.s, receipts, and inspection information. Program integrates with Masterpiece Accounts Payable and General Ledger. Masterpiece programs are written for use on the IBM 30XX and 43XX. Circle 393

Software Technology. Purchase Pro2 is designed to generate **purchase orders** and requisitions, track current price quotes, and monitor outstanding **purchase orders**. It can also perform inventory control functions and distribution management. Runs on IBM XT's or compatibles, and LANs. Circle 394

Software 2000 Inc. DM2000 provides distribution and materials management solutions specifically designed to take advantage of the power of the IBM AS/400. It's comprised of four integrated business applications: Purchase Management 2000, Inventory Management 2000, Bill of Materials 2000, and Order Management 2000-all fully integrated with company's financial and environmental products. Functions include multi-ship-to location support, an automated delivery scheduler, fast entry, real-time vendor performance analysis update, sourcing support and five-way invoice matching. Circle 395

Structured Computer Systems Inc. Designed for the senior purchasing professional, Reality totally automates the purchasing process from requisition entry through P.O. creation and vendor invoice matching. In addition, Reality contains advanced functionality such as EDI, bar coding, imaging, and touch-tone requisition entry and inquiry with automatic FAX confirmation. Runs on IBM and compatible PCs and LANs. Circle 396

SYMIX Computer Systems Inc. SYMIX is a 15-module, fully-integrated manufacturing control and accounting software system designed for make-to-order, make-to-stock, job shop and combination manufacturers. The module maintains detailed vendor information including vendor history and communications, material costs and variances, leadtimes, and delivery dates. Users enter, generate, and monitor **purchase orders** and blanket P.O.s easily. Purchasing also provides extensive text, and manual and automatic receiving. Flexible reporting provides status, cost variance, and transactions listings, and notes past due orders, requirements, and dollars committed. The module can operate as a standalone, but is most effective when integrated with the SYMIX Inventory Control (w/multi-warehousing), Customer Order Entry, Shop Floor Control, Accounts Payable (w/multi-currency), Data Collection, and General Ledger modules.

SYMIX runs on UNIX, AIX, HP-UX, XENIX, DOS VMS and LANs. Circle 397

Technical Services Association. GATEWAY 2000, MRO processes **purchase orders**, change orders, service orders, requisitions, receiving documents, and quotations. Price extensions, discounts, and sales **tax** are calculated as orders are entered, and all data are updated automatically. The system's database permits full tracking of vendors, stock items, and standard pricing and generates more than 150 executive reports. **Purchase orders** and other documents can be customized to match existing order formats. All functions are menu driven.

A search key activates pop-up windows which permit point-and-shoot selection of individual items from various information files. Help prompts are available on all entry fields. A number of value-added modules can be integrated into the base package. Package is PC-based including the IBM System 2 and can be networked. Supports both standard and laser computer printers. Circle 398

PS/2, XT, AT and compatibles. Premier runs on MS DOS, SCO UNIX, XENIX, and Sun Sparc operation systems. The product is shipped network ready for Novell, 3-COM, Alloy, and Lantasticle-and multi-location operations. Circle 355

AR Traffic Consultants Inc. CalCost is designed to analyze landed

costs at time of purchase. It compares prepaid vs. collect shipping based on your carrier's rates and discounts. System creates and maintains a vendor file for future purchases. System includes CalcRate module for rating, auditing and payment. CalcEDI, an electronic processing module for shipping documents, auditing and freight bills is also available. Circle 356

Ask Computer Systems Inc. New features enhance MANMAN for multisite, often multinational manufacturers, and for high-volume, repetitive, and just-in-time manufacturers. Major new functions include multiple plant integration, electronic zero inventory, international and multination enhancements, and improved user interface. Multiple plant integration allows MANMAN systems at two or more locations to be integrated.

Popular applications are electronically initiating and tracking inventory transfers between sites and maintaining a central bill of materials. Circle 357

Beacon Expert Systems Inc. Negotiation training software,

Negotiator Pro, provides a useful format for preparing for negotiations through the analysis of your own and the other negotiator's negotiation styles, using models and analysis of a broad range of factors that influence negotiations. Models range from positions and interests through parties, present and absent, who may influence the results. It provides structured planning and preparation, a small expert advisory system, 27 tactical options, and a summary of current negotiation theory in more than 120 hypertext entries. It is the first negotiation tool to combine hypertext, edit windows, and experts system and training. Available for IBM compatible and Apple Macintosh systems. Circle 358

Bellwether Software Corp. Purchasing Management Extra (PMX-2) is a full-function Purchasing System for PCs, PC LANs, and DEC VAX platforms.

PMX-2 includes the following modules: purchasing, with P.O. generation, history, and management reports; receiving, with receipt entry, open/overdue order tracking, and vendor performance ratings; requisitioning, with requisition entry and automatic conversion to purchase orders; inventory, with inventory balances tracked at multiple inventory warehouse locations. PMX-2's modular design allows users to start with a few modules and add more when they are ready. An Import/Export utility allows transfer of data to and from any mainframe, mini, or micro software system. Circle 359

B.W. Rogers. Tribute, a UNIX- and XENIX-based software program, provides cross system portability and operation as well as access and communication between different computer systems. It is a fully integrated

distribution software system. Functions include automated quotation to order function, inventory management system, real-time releasing of pick/pack sets, integrated purchasing and accounting systems, and EDI. Works on all personal computers, digital equipment, and IBM's RS6000. Circle 360

CACI. FAR-TRIEVE provides quick, accurate answers to acquisition regulation questions. When combined with office systems, can be used to research the Federal Acquisition **Regulations** and its supplements. FAR-TRIEVE also has the ability to print the clauses researched as well as 22 standard forms. A yearly subscription entitles the user to monthly updates of the FAR and FAR supplement data. Compatible with most systems, including PC LANs. Also available from CACI is SACONS FEDERAL. Program uses interactive, menu-driven prompts to assist buyers and contract specialists in requirements analysis, source identification, solicitation preparation, bid evaluation, contract award, administration, and closeout. Product supports small and large purchasing: prepares solicitation, amendment, award modification documents; tracks purchase requests from initial receipt through post award; accepts customer-generated status requests, cancellation requests, and stock number changes; maintains purchase, price, and vendor histories, ship-to addresses, item records, and purchase requests records. Circle 361

Cardinal Data Corp. PRO/FIT **Purchase Order** Management System has been designed to meet the needs of medium to large organizations with complex purchasing requirements. The keystone of the system is the Configurator Subsystem which permits unique, user-defined processing paths for both regular orders and orders that require special handling, such as requisitions, bids, contracts, non-inventory effecting orders, etc. Extensive use-oriented features include flexible status assignment, document scheduling, costing, price maintenance, vendor analysis, reconciliation, and unlimited free-form automatic text. Cardinal's proprietary Decision Support Matrix Inquiry tool gives users extensive on-line access to information using any combination of ten order-selection criteria. The system is fully integrated with Cardinal's entire PRO/FIT Network including Sales Order Management, Inventory Control, Accounts Receivable, Accounts Payable, and General Ledger. Circle 362

Carrier Logistic Inc. ROUTRONIC 2000 is a customer service, routing, and dispatch system developed for intracity truck fleets providing delivery and pickup service. System receives delivery and pickup notices which are then automatically routed using a unique grid routing algorithm for each city where the system is installed. Customer service can inquire about the

status of all shipments being picked up or delivered. Numerous performance and sales reports are available. Mobile Data Interface is also available. The software runs on IBM RS 6000, RT, and PS/2, and operates on UNIX, AIX, MS-DOS, OS/2, and LANs. Circle 363

Cincom Systems Inc. The Purchasing (PUR) system from Cincom manages all purchasing activities from requisitions through receiving. The Purchasing system provides control, access to shared information, and integration with manufacturing and accounts payable, while minimizing clerical effort. The Purchasing system is a primary component of CONTROL:

Manufacturing. Major facilities include purchased item definition, vendor definition and sourcing, requisition and **purchase order** management, receiving control, invoice matching, and vendor analysis. Runs

on IBM 43XX, 30CC; full DEC VAX family. Circle 364

Command Line Corp. The CLC-PM4 Management System for purchasing is a complete purchasing system from requisitions and **purchase orders** to receiving and automatic update of inventory, vendor, and purchasing history files. The system maintains buy card files and tracks non-database purchases as well. Proprietary dual database allows for immediate access by either code number or name for easy screen browse and for reports. Available options include vendor performance analysis, automatic conversion from RGQ to P.O., totally paperless purchasing, EDI features, electronically approved purchases for separate stockrooms or warehouse locations, bar coding, automatic requisition capability, and many other custom features. Systems can be customized for user's part numbers, field sizes, reports, special account numbers, etc. System can also be expanded, initially or at a later date, to connect with additional modules

in the CLC-MMP and/or the CLCMRP Manufacturing Management System. Interfaces with mainframe accounting system. The multi-user system operates on IBM and IBM DOS compatible computers with hard disk in a LAN configuration. Circle 365

Compliant Systems. The Buyer's Toolkit is a collection of analytical purchasing techniques designed to provide decision support. The software performs learning curve analysis, quantity curve analysis, quantity discount analysis, economic order quantity and lot sizing, return on investment analysis, lease vs. buy analysis, and others. It features 62 commodity specific price escalation tables, based upon the Producer Price Index, which adjust historical prices to current and future periods. A built-in escalation table editor allows modification of existing price

escalation tables and the addition of new ones to the system. The Buyer's Toolkit runs on IBM and compatible personal computers. A site license and customization are available. Circle 366

Computer Task Group Inc. (CTG). POM/ TAS **Purchase Order Management**) is an on-line, real-time purchasing-receiving-accounts-payable system that operates on IBM mainframes. The system includes vendor quotations, **purchase requisition** processing, requisition-to-**purchase-order** conversion, on-line **purchase order** action lists and printing, on-line receipts to **purchase orders**, and full accounts payable capabilities. Provides full on-line inquiry plus detail and summary reporting. CTG tailors POM/TAS to its clients' specific requirements including EDI. POM/TAS can be readily integrated into a full manufacturing system. Circle 367

C.R. Smolin Inc. E-Z MRP is a self-teaching, self-installing, entry-level, micro-based MRP system designed for small manufacturers. Package provides the purchasing planner with detailed schedules of component requirements. Its zero-inventory, daily bucket, lot-for-lot approach allows purchasing managers to establish JIT systems with vendors.

It captures all inventory transactions in a disk file audit trail allowing the user to generate purchase price variance reports, do lot and serial number tracking, and generate shipping and receiving. A multi-user, file locking version compatible with all networks is also available. Circle 368

Dialog Systems. Company offers the Expert Line of purchasing decision support systems for personal computers. Price Quotation (PQE) package allows for analysis of proposals based on quantity discounts, prices, transportation cost, onetime charges, commodity groupings, and payment terms. Cost Price Evaluation (CPE) performs cost analysis on supplier's cost proposals; evaluates all direct, indirect, and ancillary costs. Fed-C.A.P. Federal Cost Analysis Program performs analysis for aerospace and defense contractors. Circle 369

Dun & Bradstreet Software. The DBS Purchasing Systems are part of an integrated materials management solution which consists of Inventory, Purchasing, and Accounts Payable modules. The Purchasing System is an on-line, real-time system that automates the entire procurement cycle from processing **purchase requisitions** through quotations, **purchase order** generation, receiving and inspection. Invoice payment authorizations are processed via integration with the Accounts Payable System. The System is designed to accommodate the needs of a variety of industries and offers advanced features such as EDI interfaces, vendor analysis and evaluation, real-time P.O. printing, and user defined ad-hoc reporting capabilities. Circle 370

Dynamic Software. QPII includes a sophisticated vendor activity

management program which has been derived from Dynamic Software's Sales Activity Manager line of software. QPII **purchase orders** feature an unlimited amount of header and line item comments. Standard boilerplate comments may also be used for repetitive requirements. QPII supports change orders, supplemental orders, blanket orders, releases, and requisitions. Any P.O. can be automatically copied to create a new P.O. of any type. P.O.s may be copied to the same vendor or to different vendors.

QPII items may have an unlimited amount of description. In addition, an unlimited amount of item-specific comments may be entered for each item which will print on the P. O. Detailed item specifications or delivery requirements will be automatically printed each time the item is ordered.

Optional modules are available for end-user requisitioning, RGQ and quote tracking, and inventory management. QPII runs on IBM compatible PCs and most LANs. Single user and multi-user versions are available. Circle 371

Genzlinger. **Purchase Order** Processing (POP) creates and maintains purchasing records and ensures the quality, accuracy, and promptness of deliveries of purchased materials. POP's capabilities for predicting cash requirements, monitoring vendor performance, and preventing shortages of needed materials can accommodate manufacturing and distribution environments. Features include the access of vendors and inventory items by number or partial name or description; allows on-line entry and editing of regular and blanket P. O. s; and records multiple vendors' part numbers for each inventory item. Circle 372

Global Software Inc. **Purchase Order** System features include automatic interface to General Ledger and Accounts Payable, Inventory Sales Analysis, and Hospital Materials Management Systems; complete interactive **purchase order** and requisition creation on-line; requisition tracking; recurring and model order capabilities; interactive receipt matching and invoice processing; immediate order printing; real-time analysis and corrections; on-line inspection and quality control; full real-time validation; expense and budget control; vendor performance analysis; forecasting of commitments; and optional batch **purchase order** to create receipt activities. The product fully supports the X.12 EDI standard both in sending information to external vendors and in updating the **purchase order** record with a confirmation of receipt of the order. A one-year warranty is included. Operates on IBM mainframe and midrange systems, including 30XX, 43XX, 937X, ES/9000 and AS/400. Circle 373

Greentree Software Inc. CAP3 modular purchasing and materials management systems can be used as standalone systems or integrated in a LAN for multi-users or wide area network, for multi-sites. The CAP3 Purchasing System includes purchasing, receiving, electronic file cabinets, boiler-plate and free-floating text, interfaces to word processing, point-and-shoot key work search windows, real-time vendor performance, JIT,

and contract analysis. Optional modules include On-line and Remote Purchasing Requisitions with authorization level security codes, Inventory with multiple site and consignment plus ABC analysis and inventory planning features, Inventory Withdrawal Requisitions, Request for Quotation and Quotations Analysis, and many different Communication modules which facilitate two-way communication between CAP3 and other systems. Circle 374

IBC. PurFax, a complete purchasing management system, transmits daily ordering requirements from a PC to a supplier's facsimile machine. The system also offers computer-generated orders, inquiries, messages, and detailed reports to enhance the daily procurement process. Circle 375

IMC Software Systems Group. Blue Chip MRO Materials Management System

is an on-line fully integrated purchasing/inventory control software system. The system is designed for the procurement and control of MRO supplies, both stock and non-stock. The system supports the complete procurement cycle beginning with the requisition through payment of the invoice. The vendor file, inventory file, and accounting file make up the

data base from which all the other documents are produced. All screens are

menu driven using function keys with instructions integrated into each screen providing users with instant help. Many reports, including a report generator, are standard. Other options supported include internal FAX, bar coding, EDI interfaces, custom **Purchase Orders**, and custom interfaces to Maintenance Management Systems. Recently added is the Invoice

Matching module that interfaces with Blue Chip allowing on-line matching of invoices using the receiver and **purchase order** generated by Blue Chip. General Ledger distribution and payment can be made or passed on to your mainframe through a custom interface. The software is designed to

run using MS-DOS in PC networks. Circle 376

IMREX. **Purchase Order** Management system features multi-company, multi-warehouse, multi-currency capabilities; real-time generation of **purchase orders** for inventoried and non-inventoried items; cross reference ability of vendor item number to your number; blanket orders, requisitions and reservations; consolidations of multiple requisitions by vendor and by item to ensure best price and quantity discounts; multiple receipts per **purchase order**; multiple ship-to addresses per **purchase order**; comprehensive vendor performance and analysis; copy order feature; and dynamic search of the vendor and item database. Circle 377

